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NICHOLAS CHARLES HARBORD VARNON. B.A.

THE TRAINING OF GOVERNORS, HEADTEACHERS AND SENIOR STAFF IN
PREPARATION FOR LOCAL MANAGEMENT OF SCHOOLS (LMS) WITH
PARTICULAR REFERENCE TO FINANCIAL MANAGEMENT.

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ABSTRACT.

THE TRAINING OF GOVERNORS, HEADTEACHERS AND SENIOR STAFF IN PREPARATION FOR LOCAL MANAGEMENT OF SCHOOLS (LMS) WITH PARTICULAR REFERENCE TO FINANCIAL MANAGEMENT.

The Education (Number 2) Act 1986 and the Education Reform Act 1988 transferred and increased the responsibility for the management of schools from Local Education Authorities to school governing bodies: "Local Management of Schools". In managing, governing bodies would remain partially accountable to Local Authorities and HMI in terms of National Curriculum delivery, and to Local Authorities in the auditing of their use of budget resources. The introduction of a wider accountability to the local community, focused on the annual report to parents, would increase responsibility.

Transferred and increased responsibility requires governing bodies, headteachers and senior staff to acquire the knowledge, skills and attitudes (management attributes) necessary to manage effectively, carry out responsibilities and account for their management record.

The strategies adopted to provide for the acquisition of management attributes were designed by Local Authorities as a short-term response to the immediate needs of school managers: this was management "training". The strategies, content and processes of providing management training are analysed and assessed, focusing on the first two years of Local Management implementation (1988 to 1990). Financial management training is of particular interest.

For the longer-term continuity of management, training will contribute to, but not entirely provide, adequate support for governors, headteachers and senior staff at 'Authority level'. Managers will need to acquire attributes of self-analysis, identifying the organisational management needs which require client-orientated support programmes: this is management "development". Recommendations are presented to effect a change from management "training" to management "development", the Authorities no longer being the automatic providers but acting more as development agencies.

**THE TRAINING OF GOVERNORS, HEADTEACHERS AND SENIOR STAFF IN
PREPARATION FOR LOCAL MANAGEMENT OF SCHOOLS (LMS) WITH
PARTICULAR REFERENCE TO FINANCIAL MANAGEMENT.**

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**THE TRAINING OF GOVERNORS, HEADTEACHERS AND SENIOR STAFF IN
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PARTICULAR REFERENCE TO FINANCIAL MANAGEMENT.**

PREFACE.

1. THE AIMS OF THE STUDY.

This study assesses the short-term introductory management training needs of governors, headteachers and senior staff during the period 1988 to 1990, approximately. The author is an Assistant Education Officer (Schools Management), responsible for handing over management to schools and training these 'senior managers'.

The restricted focus on 'senior managers' is because they will take on the initial responsibilities: they have the need for training. It is acknowledged that all teaching staff (and non-teaching staff) will become part of a more complex corporate management structure in the 'self-managing school' and have the potential for promotion to 'middle management' and 'senior management' posts; all have the need for training to prepare them for increased responsibilities. In the context of this study, until current 'senior management' training has been evaluated, 'middle management' and standard scale teachers will remain generally outside the scope of this research. Passing reference may be made to them, but this approach does not preclude their vital contribution to the education of pupils which is the central purpose of schools.

The study initially focuses on 'training' but this, and other 'learning' concepts which are central to the discussion, require definition:

MANAGEMENT TRAINING: the modification of behaviour through experience, tending to focus on the narrow vocational learning of specific skills, transferable to any comparable educational organisation.

MANAGEMENT EDUCATION: the provision of a broader skill structure in which the dynamics and inter-relationships of management training skills can be explored and transferred to most comparable educational organisations.

MANAGEMENT DEVELOPMENT: a systematic process of ensuring that at all levels an individual organisation has the effective managers it requires to meet present and future needs. It aims to make managers more effective by providing a range of related growth and development experiences, by monitoring performance, and with practice centred on the individual educational organisation.

This study recognises that currently training is provided directly by the Authority through tutors, either employed personnel from within the Authority, or voluntary tutors supported and directed by the Authority. Training may also be provided by external agencies such as the PTA where the Authority has invited tutors with particular expertise to contribute. Diocesan training may complement the Authority training. External sources of training (i.e. organisations outside the Authority) are referred to but are not the focus of this study. Their potential contribution to the total spectrum of training provision available is acknowledged however.

2. CONCLUSIONS.

The conclusions of the research are that, while relatively short-term introductory 'training' should provide a reasonable level of core knowledge and information, long-term management 'development' is essential for all managers. Management 'development' becomes the focus of the recommendations presented.

This study is being completed in Spring 1991; legislated changes are anticipated for 1993 and beyond. Some of the 1988-1990 commentary must already be considered in an 'historical' context, therefore. However the recommendations for post-1990 management training should still be valid.

3. THE STRUCTURE OF THE STUDY.

The study is divided into seven Chapters covering the following broad themes:

CHAPTER ONE concentrates on the need for the study of the Local Management of Schools and justifies the approach chosen to effect this.

CHAPTER TWO comments on the research into Local Management training and the preparation for training that has been published so far by a variety of sources.

CHAPTER THREE outlines the research methods to be employed to gather 'primary data' on the preparation for training in England and Wales, and on the effectiveness of training completed so far with particular reference to South Glamorgan.

CHAPTER FOUR presents the 'primary data' results.

CHAPTER FIVE presents an analysis, interpretation and discussion of the results.

CHAPTER SIX contains recommendations for training strategies that respond to the needs revealed by the analysis and interpretation of results.

CHAPTER SEVEN sets out reflections and self-assessment of the author's involvement in a research project, and a discussion of potential areas for further research.

Each Chapter will start with a Preface outlining the aims of the Chapter, commenting on the Section structure and content.

APPENDICES following Chapter Seven will include a Glossary and details of material of interest, but not essential in contributing to the textual discussion. Appendices will also contain additional research data.

BIBLIOGRAPHY: References in the text will be given in full after the Appendices.

CHAPTER ONE

THE EMERGING MANAGEMENT RESPONSIBILITIES AND SKILLS REQUIRED BY THE LOCAL MANAGEMENT OF SCHOOLS.

PREFACE: The Chapter will initially take a broad view approach of the introduction of Local Management of Schools (LMS), focusing down on the finer details of growing responsibilities, and therefore the need for new skills and training, in the following sections:

Section One will consider the extent of Local Management, and the responsibilities of governors and headteachers before the Education (Number 2) Act 1986 and the Education Reform Act 1988, in order that the changes that the Acts will bring about are placed in an historical context.

Section Two will consider the broad context of Local Management as it will affect all aspects of school management.

Section Three will examine financial aspects of Local Management, explaining the framework of the General Schools' Budget and the formula-generated Aggregate Schools' Budget.

Section Four will consider the skills of management required before Local Management.

Section Five will assess the new general management skills demanded by Local Management, for governing bodies as a whole and for headteachers and senior staff as individuals.

Section Six will briefly restate the main themes of growing management responsibilities and will anticipate the training requirements discussed in Chapter Two.

**SECTION ONE: MANAGEMENT RESPONSIBILITIES BEFORE THE
EDUCATION (NUMBER 2) ACT 1986 AND THE EDUCATION REFORM ACT
1988.**

In England and Wales education has been the responsibility of Local Education Authorities (LEAs) with management decisions being initiated by the Authority. The headteacher and governors may well have contributed to the decision-making process at school level but the pattern varied. There is evidence to show that the good relationships fostered between some headteachers and Education Officers, and indeed the persuasive powers of individual headteachers and influential Members, enabled a school to be resourced at a higher level than Authority-wide policies would have suggested would be right. As Knight observed:

Large schools have more leverage. Heads and senior staff are better paid; some large schools acquire county or national fame; the governing bodies tend to be more prestigious and therefore attract higher calibre governors (some LEAs only!) In many cases this has given larger schools stronger leverage for securing an increase in points, equipment or funds. (Knight 1983 p52)

Stewart describes the rather limited schools' management responsibilities in the wider Authority context, their accountability being to central political, administrative and managing bodies rather than to the local community. He stated:

The formal lines of accountability were clear and sufficient. The education department was accountable through the education committee to the local authority and the accountability of the schools lay through the department to the committees. (Stewart 1986 p10)

Schools were effectively at the receiving end of a Members-Officers-school policy implementation line and had to manage the staffing resources, both teaching and non-

teaching, capitation, buildings and grounds which made up the support for the education process, but as a reactive management response rather than a proactive one.

Even though reactive management response might have appeared rather restricting, some schools gradually got the reputation, through 'good examination results' or 'a caring atmosphere', for example, of being 'better schools'. This was due in part to good personnel management and therefore it could be argued that, as the headteacher and senior staff were directly involved in personnel management, schools had considerable management responsibilities to exercise. But, if one of the most important attributes of managing is having the flexibility to identify priorities and respond to them, in most areas other than internal personnel management schools could only go ahead if Authority policy supported them.

It is of value at this point to consider why and how flexibility and increased management responsibility were introduced before 1986. They were essentially responses to change. Change can come from external forces in society or the 'environment' which happen to stimulate the educational climate and in so doing make change more likely to occur. As Kast and Rosenzweig pointed out:

The institutional level is involved in relating the activities of the organisation to its environmental system. The organisation must continually receive supporting inputs from the society in order to carry on its transforming activities. (Kast and Rosenzweig 1988 p53)

The question, then, is to determine the source of the inputs from society and whether they were derived mainly from

external or internal forces demanding change within education. The new management responsibilities which emerged were probably mainly the product of a number of external factors.

By the early 1970s the climate of change affecting managerial responsibility was being gently influenced from abroad as a result of the variety of schemes of Local Management introduced in Australia, Canada and the United States of America. Gittell in the U.S.A. observed that in the early 1970s:

Urban school reform through expanded community control is an attempt to achieve a new balance of power...(with)... local community groups competing with the professionals for power resources and a larger share in the decision-making process. (Gittell 1970 p115)

James and Levin noted that in the USA new power balances affected spending decisions. They commented:

The central school authority will still be responsible for obtaining revenues for the schools through its own taxing powers and through financial aid from higher levels of government. Yet it would no longer determine how that money was spent in each school. (James and Levin 1970 p256)

Impetus for change also came from economic factors outside education. National economic problems resulted in the growth of 2 - 3% in the economy during the early 1970s being turned into constraint or decline during the mid-1970s. Stewart observed:

The pressure of constraint led to change both in the information required and in the process of management. Local education authorities were forced to review radically existing patterns of organisation and ways of working in a search for value for money. (Stewart 1986 p8-9.)

Authority reviews represented a significant shift: from

'more money for education' to 'better value for money in education'. One way of getting value for money and, in achieving this, changing the process of management, was by allowing far more local control and responsibility so that each school could exercise constraint. This would change the rather 'blunt knife' approach that the Authority might wield in managing, to the more sensitive instrument of the individual school management decision.

Another major contributor to the debate in the mid-1970s was Taylor's report, "A New Partnership For Our Schools" which made a number of recommendations. Explaining the purpose of Taylor's work in assessing the role of school governors, the Advisory Centre for Education commented:

By the late seventies some 90 per cent of LEAs had introduced some representation of parents and about the same percentage representation of teachers, but meanwhile the government had decided to appoint a committee of inquiry to look into the whole question of schools' relationships with their public, their communication with parents and the proper role and functions of school governors. This was the Taylor Committee, which began its work in 1975. (ACE 1988 p1)

The report took up several arrangements from the 1944 Education Act and 1945 Articles which were not being widely followed. For example, discussing the procedure suggested in the 1945 Articles that governors should consider the Authority estimates for the year and send their estimates to the Authority for discussion, Taylor said:

We think it (the procedure) should be followed in order that governors become more fully informed of the economics of education and exercise a more effective control over the management of the school for which they have responsibility. (Taylor 1977 p66)

Taylor's suggestion was a significant shift away from the

Officer/headteacher 'negotiations' which have been outlined above.

Taylor extended the new responsibilities envisaged quite specifically into the control of expenditure, rather than the management of expenditure identified by the Authority for a particular purpose. But, Taylor envisaged, the Authority retained some control:

We regard it as axiomatic that power to control expenditure overall must.... remain with whoever is responsible for financing the expenditure and this means the LEA. We therefore take it as given that the local education authority must.... be in a position to exercise effective control over the levels of expenditure by governors. (Taylor 1977 p65)

Taylor also commented on the existing Authority culture of the time, that of wanting to retain some control rather than delegating it entirely:

We have assumed therefore that most local education authorities would wish to exercise some control over the structure of the school's budget. (Taylor 1977 p66)

But Taylor was concerned that Authority control should be limited for:

We consider that every local education authority should keep to the minimum necessary restrictions which, for financial reasons, they impose on freedom of action at the school level. (Taylor 1977 p67)

Taylor's report suggested a shift of power and responsibility which was clearly away from the Authority. In many ways Taylor can be seen to have laid the foundations for the Local Management of Schools in the 1990s.

Perhaps as a result of changes in the climate affecting managerial responsibility there were a few pioneer Authorities in England which, in the late 1970s and early

1980s, had begun to develop schemes of increased responsibility for schools. Those Authorities included Cambridgeshire and Solihull, Lincolnshire and Northumberland. Whether these were as a result of experiences learned from abroad, as a result of the stimulus of "A New Partnership For Our Schools", or as an early response to the economic constraints identified earlier, it is difficult to assess. As often happens during the conceptual stage of change, individuals and groups absorb often fragmentary information, advice and opinion, without realising its cumulative effect on their perceptions. What emerges may happen to parallel, for example, Taylor's recommendations, but it is difficult to establish a direct cause-and-effect link. A study by the Secondary Heads' Association (Appendix 2) indicated no acknowledged influence of Taylor or pilot schemes abroad.

An examination of Cambridge and Solihull to discover how much management power and responsibility increased in schools in their 'pilot projects' may point towards the reasons that these Authorities felt important when taking their initial decisions about pilots.

A Cambridgeshire pilot school headteacher reported:

The scheme in the County of Cambridge evolved from an administrative scheme known as Increased Financial Responsibility which started in 1977. This scheme gave schools the responsibility for the control of orders, the certifying and coding of accounts and, perhaps more importantly, for the budgetary control of capitation and other minor items of expenditure during the year. (Hill 1988 p1)

Hill explained that the extension of the scheme in 1982-83 was to give: "More flexibility in the control of their

finances by giving authority to the governors of secondary schools to control their own budgets." (Hill 1988 p1)

It should be remembered that at this time financial constraints were being placed on Authorities and Hill noted that the schools:

Were suspicious and claimed that this may become a cost-cutting exercise. It was a time of education cuts and some heads thought that the authority may use this scheme to impose further cuts on schools.
(Hill 1988 p1)

It would appear that by accepting responsibility the schools feared that they would carry out the cuts that otherwise the Authority would carry out. Members who vote the annual Education budget would of course be accountable to the electorate; if schools were seen to be implementing cuts then the Members would be distanced from these and would therefore be seen to be less accountable. Thus schools were beginning to appreciate the connection between responsibility and accountability that a shift of power would entail.

In Cambridgeshire six secondary and one primary school volunteered to be part of the scheme, and Cambridgeshire established cluster groups of school managers, Officers and Members to exchange information and informally 'monitor' its scheme. In 1984 an Authority internal paper made observations on the impact of constraints, stating:

In the light of the financial pressures that most local authorities are now facing it is not surprising that the style of innovation, experimentation, and change in management style and systems has increased enormously.
(Cambridgeshire LEA 1984 p1)

The Cambridgeshire scheme was affected by a number of

preconditions including the sponsoring of the idea by Members, faith in Officers being able to get a scheme under way, but also: "A faith in the potential of governing bodies." (Cambridgeshire LEA 1984 p2) This potential is not examined further in the Paper but it was clearly the tenet upon which Local Management partially rested.

Some of the conclusions in the Cambridgeshire Paper are worthy of comment:

There have been some significant factors of good fortune or of good judgement:

(iii) The governing bodies and heads ... have made few decisions to change.

(iv) The governing bodies and heads have not substantially taken up options which would have extended their management. (Cambridgeshire LEA 1984 p8)

The Paper reflected the caution of school management, which is not surprising if the pilot schools were operating in an environment of suspicion about cuts in the education budget. And, arguably, new power and responsibility should be treated with caution until the schools had assessed their options and could predict the outcome of management decisions.

The Solihull pilot scheme began in 1981. Three schools were given control of their capitation allowance only, while a further three schools were given control of all school finance; this was the 'school autonomy experiment'. The Authority gave schools minimal constraints other than those of compliance with Financial Regulations, Standing Orders and Articles of Government, national agreements on scales of remuneration and policies of the Council and the Education Department. As with Cambridgeshire, it is of value to

examine internal Authority papers to ascertain how the extension of responsibility was perceived by the Authority.

The Solihull director of finance reported:

It appears that there are many areas of a school budget over which the head teacher has little effective control and, therefore, autonomy has little or no influence. However, it is accepted that certain areas of budget may well benefit from direct control by an enthusiastic, autonomous head teacher. It is my opinion that the maximum benefits could be derived from a more limited application of autonomy which would avoid the duplication of administrative procedures which are both inevitable and frustrating to all concerned in the current experiment of complete financial autonomy. (Solihull LEA 1984 p3)

Thus, whereas in Cambridgeshire it was noted that schools were very cautious in using their new responsibilities, in Solihull it was found that schools had less flexibility in practice than that which they might have wished for. There had been little willingness in Solihull schools to change their staffing levels set by the Education Department but, with declining rolls it is not clear whether this was the result of a lack of perceived flexibility or the result of general caution in a new management situation.

Solihull used an external consultant to monitor its autonomy experiment. His initial assessment contained some interesting supportive observations:

The effect of autonomy is to give schools more choice about the mix of resources used to attain objectives ... and viewed from this perspective, financial autonomy enhances the capacity of the head as an educationalist because it increases the degree of control over the resources available for achieving educational objectives. (Thomas 1984 p1)

Advantages of the school being able to achieve objectives would seem very reasonable, yet Thomas goes on to suggest that Officer control is potentially increased. He noted

that:

A further consequence of a financial autonomy scheme is to extend the degree of control over which local authority officers may exercise over the schools. (Thomas 1984 p1)

In explaining this apparent paradox of school and Officer control, Thomas made the point that the budget information available would allow Officers to monitor, compare and question expenditure patterns which resulted from decisions at school level. The decision-making process, however, still remained essentially with the school.

Control by Authority Officers would seem to conflict with the flexibility and self-determination that autonomy should bring and Thomas's comment may reveal tensions within the Authority, with Officers wishing to retain some of their 'traditional' powers and responsibilities; their 'culture' was under threat. In the wider press of "Education" Thomas commented:

This fertile ground (i.e. pilot schools likely to ensure success of the scheme), as represented by the heads, was matched by the views of the senior education officers who have argued that people would work better if they were given greater control of their own affairs. (Thomas 1983 p125)

With this background of a climate of change it is appropriate to consider the Education (Number 2) Act 1986. Responsibilities were increased for schools as a whole, but for pioneer Authorities and pilot schools their responsibilities had already extended before the 1986 Act.

In outlining the increased responsibilities and accountability which governing bodies had to accept, Barber et al pointed out that:

The 1986 Education (No 2) Act and the 1988 Education Reform Act vest considerable powers in governing bodies.... There are those who think that, despite the legislation, governing bodies in the future will behave very much as they have in the past. On the other hand, it is argued that they are bound to become more influential, whether or not they wish to, because they are accountable. Accountability, unlike responsibility and power, cannot be delegated. (Barber et al 1989 p34)

Sallis perceived a political will to place power, and therefore responsibility, at the local level, saying:

The Act has been widely interpreted as an attempt to curb the power of LEAs and teachers by placing more in the hands of governors and parents ... the Act defines a sharing role for governors not only in curriculum matters but also in school discipline, spending, and appointment of staff ... (Sallis 1986 p1)

But if the essential purpose of a school is to deliver the whole curriculum then, as Sallis pointed out, the Authority retained its responsibility:

It is worth noting, however, that the responsibility of the LEA for the curriculum in its schools as a whole is firmly restated, with governors given the task of applying and if necessary adapting this general policy to the circumstances of their own schools. (Sallis 1986 p1)

Sallis raised two points which are worth considering. First, if the Authority's responsibility is "restated", yet the governors are "given the task of applying", it could be said that the real responsibility lies with the governors and the Act has thus "curbed" Authority power. Second, if more power is "placed in the hands of governors and parents" and yet parents have no 'formal power', where does the balance of responsibility lie? It would seem to lie with governors who are accountable to parents through their annual reports, and accountable through their response to 'the market place' wherein parents select the school for their children that

they perceive to be delivering an appropriate curriculum, in its widest 'whole curriculum' sense.

As far as the general responsibility for the conduct of schools is concerned the Act made it clear that an Authority must at least consult with a governing body. In the area of finance, while the governing body is given discretion over the spending on books, equipment and stationery, i.e. 'capitation', control does not come without potential constraints, however. The Act noted:

It is the duty of the governing body, in spending any such sum, to comply with such reasonable conditions as the authority think fit to impose.
(Education Number 2 Act 1986 p32)

So the Act allowed responsibility to shift but with finance provided the opportunity for Authorities to write in limiting conditions. Whether they were 'reasonable' or not could only be ultimately tested in a court of law.

In 1988 the Education Reform Act received Royal Assent and Circular 7/88 was published to: "Offer guidance", and: "Set out criteria". (Circular 7/88 1988 p1) The Circular outlined the general principles and framework of the Schemes for Local Management of Schools with a discussion of the responsibilities of Authorities, governing bodies and headteachers. As responsibilities and the training needs to prepare for these are central to this study, the Circular must be looked at in some detail.

The Circular commented on the new roles of Authorities:

Under schemes of local management, LEAs will take on a more strategic role. They will be free from the need to exercise direct, detailed control over the bulk of spending in schools with delegated budgets, but will have a vital overall responsibility for ensuring that local management is effective in delivering better education. There are a number of key areas where the LEA will have a lead function. It will:

- determine the total resources available to schools;
- establish the basis for allocating resources to individual schools;
- set out the conditions and requirements within which governing bodies must operate. (Circular 7/88 1988 p6)

So, if Authorities are "free from direct, detailed control" the governing bodies must take on this responsibility. The Circular explained their responsibility:

The governing body will control the running of a qualifying school within its delegated budget.....The governing body and the head teacher will have freedom to deploy resources within the school's budget according to their own educational needs and priorities. (Circular 7/88 1988 p6)

Quite clearly a 'freedom to deploy resources' placed responsibility with the governing body. The Circular linked the school staff into the overall framework of responsibility, anticipating their importance in the context of managing, through a management plan, the implementation of the National Curriculum:

The head teacher will have a key role in helping the governing body to formulate a management plan for the school, and in securing its implementation with the collective support of the school's staff. (Circular 7/88 1988 p6)

The headteacher will therefore have the essential function of facilitating the governors to manage strategically, while the senior staff manage at the operational level. The responsibilities of governors, headteacher and senior staff

are thus dissimilar. Their training needs to support responsibilities are dissimilar, though complementary.

The Act and the Circular set the responsibilities of governing bodies for all schools within Authority Schemes in a national framework. The pioneer Authorities and pilot schools were thereby absorbed into the new whole, bringing with them the experiences and lessons learned to be passed on to others. It is to the general issues and broad context of Local Management that this study will move.

SECTION TWO: THE BROAD CONTEXT OF LOCAL MANAGEMENT OF SCHOOLS (LMS)

Each Authority had to devise its own scheme for delegating responsibility for management: "To respond to its local needs and circumstances." (Circular 7/88 1988 p3) The Secretaries of State wished for a Scheme that: "Should be as simple and clear as possible, so that governors, staff and the local community are fully aware of how it operates." (Circular 7/88 1988 p3)

In devising Schemes, Authorities had been sharing ideas and several had visited Cambridgeshire and Solihull to learn from their years of delegation experience.

Local Management Schemes were implemented at a time when the main function of a school, to educate pupils and develop the whole curriculum, was being reviewed as the National Curriculum was beginning to be implemented. The twin thrust of two major changes in the way education would be managed and delivered brought manifest difficulties for Authorities and schools in terms of prioritising tasks. Change also brought fears that schools would be overwhelmed by the perceived complexity of management demands placed upon them.

The National Curriculum will be phased in during the 1990s. While based largely on good practice already found in many schools, it will have a significant impact on the planning, the content and the delivery of teaching on a daily basis. There will therefore be significant resourcing implications for teaching and supporting materials which the general school management plan will need to acknowledge. Added to

this, and complementary in that it helps to measure the effectiveness of those delivering the National Curriculum, staff appraisal may eventually be introduced. All of these initiatives are part of 'Local Management'.

The context of Local Management and the broader issues of accountability were discussed by Barber et al who wrote:

Discussions about LMS tend to focus on the financial management of the school, but the fundamental challenge of LMS to school management is the coupling of resource decisions by the school to higher standards of attainment by the pupils. LMS therefore covers the whole of school management - the management of policy, the curriculum and learning standards, staffing, and the use of all (not just financial) resources - and the requirements of accountability consequently apply to the spectrum of school management. (Barber et al 1989 p30)

Further complications to establishing an effective Local Management structure are competitive tendering and the development of community use of school premises. These aspects of school organisation have resourcing implications, all in areas which in the past have been subsumed by the Authority management and budget on an Authority-wide scale. Management at local 'cost centre' scale is relatively untried in these areas.

This is the broad context of the Local Management of Schools which passes responsibility to governing bodies for making management decisions, accountable to their clients, but with very limited experience of the range of educational initiatives which are being introduced. The central initiative is the National Curriculum. Resourcing decisions are an integral part of the new Local Management approach and so this study will consider the financial framework

within which each school will have to resource its educational objectives.

SECTION THREE: FINANCE WITHIN THE LOCAL MANAGEMENT OF SCHOOLS.

The purpose of this outline of financial resource distribution is to put into context the management skills that will be demanded when Local Management is introduced, compared with those demanded before the Local Management of Schools.

As Appendix 3 shows, an Authority has a general schools budget which represents the total expenditure incurred in primary and secondary education in any one year. It is expressed in cash terms and includes provision for inflation predicted during the financial year. Mandatory and discretionary exceptions are excluded from individual school budgets by Act and Regulations. Appendix 4 shows an illustration of the split of the general schools budget into these exceptions and the aggregate schools budget, using South Glamorgan's 1990/91 budget as an example.

Governing bodies will need to understand the nature of the discretionary exceptions and the 'potential school budget' share that their school would receive should these be delegated. However the major budget share is the Aggregate Schools' Budget to which a formula will be applied to generate a school budget share. A very simple formula would be based on pupil numbers and floor area. This would be "simple, clear and predictable", but most Authority schemes have built in a number of sub-formulae to respond to 'local needs and circumstances' and governing bodies should be able to apply these sub-formulae and predict the outcome in terms of their school budget.

The Authority schemes have to distribute 75% or more of the Aggregate Schools' Budget by a formula that is based on pupil numbers weighted by age; 25% or less will be distributed according to 'other factors'. It is important to realise however that the 75% - 25% allocation operates at Authority level, so that at an individual school it may be the case that slightly less than 75% is based on pupil numbers. A governing body will need to be able to identify the percentage of pupil costs and other costs. It will also have to appreciate the impact that changing school rolls will have on the school budget, and the anticipated changes that may affect future spending plans.

In looking at the pre-Local Management skills in Section Four reference will be made to Cambridgeshire and Solihull as two pioneer Authorities. Section Five will consider the emerging management skills demanded as a direct result of the introduction of Local Management.

SECTION FOUR: PRE-LOCAL MANAGEMENT SKILLS.

Before the Education (Number 2) Act 1986, the pre-Local Management skills involved the management of the education process rather than the management of the resourcing of education. At the strategic, educational-political level, management responsibilities were recognised by Brooksbank and Revell as:

Between the constraints of government pressure to reduce public expenditure and the level of inescapable commitments such as salaries ... the responsibility of governors to exercise their financial obligations fully becomes, in these circumstances, all the more important so that the education committee is fully aware of what is necessary to the fulfilment of its duty, however limited its resources may become. (Brooksbank and Revell 1981 p21)

It must be emphasised that financial obligations were limited at the practical school application level and were in the hands of the headteacher and senior staff. Schools effectively only had control and responsibility for resources to spend on the purchase of teaching materials, as Burgess and Sofer identified:

The only part of all this (i.e. school and Authority budgets) that appears in the form of estimates before the governors is, in most authorities, ... what is usually called the capitation allowance. (Burgess and Sofer 1978 p34)

Capitation in the large secondary school of, say, 1500 pupils might amount to between £70,000 and £100,000. This amount may be split between 'departments' or 'faculties' by the headteacher and heads of department, and this was their effective day-to-day management of the delivery of education. However the governors were not directly involved. Indeed, even after several years of experimenting with delegation in most budget headings, in Cambridgeshire the

situation had changed very little. Rosenthal observed that:

While technically the governing body is responsible for financial delegation, in Cambridgeshire head teachers take overall responsibility. (Rosenthal 1988 pl7)

The implementation of the education process is the responsibility of the headteacher and governing body and therefore the management of those who deliver the education process, the teachers, is vitally important. Before Local Management, depending on Authority policy, the short-listing and appointment of staff might have involved the governing body, at least in the interviewing stage. The Authority Officers and Advisers played an important role in that process however, and it was certainly not always the case that the headteacher or the governing body were called upon to exert their management skills on appointment procedures.

Once a teacher was in post it was largely up to the headteacher, or a nominated deputy or senior teacher, to manage the professional responsibilities that the teacher undertook and monitor how well these were implemented. As Thomas identified in Solihull: "Even without financial autonomy head teachers have substantial control over deployment of teacher time." (Thomas 1984 pl)

A good headteacher with well-developed management skills would get the best out of the whole staff but it was not always the case that it was the experienced headteachers who had acquired those skills. Good management depends partly on a 'human factor' which can not be defined in terms of experience or training.

Before the introduction of Local Management of Schools the

skills which were necessary for good management were acquired through practice and were probably sufficient, supported or directed by Authority staff, to ensure that a reasonably acceptable education service was delivered. The skills and control were firmly in the hands of the headteacher, however. The educational climate began to change after Callaghan's Ruskin College speech in October 1976 opened up a public debate on standards. By the introduction of Local Management, headteachers, senior staff and governors would be made more directly accountable for standards through their management of educational resources and educational processes. This study will consider to what extent managerial power has shifted to achieve standards, therefore, and how the new management skills that will be required to effect satisfactory standards are going to be provided.

SECTION FIVE: THE REQUIREMENTS OF LOCAL MANAGEMENT SKILLS.

The 1988 Education Reform Act introduced Local Management of Schools, "A massive social experiment." (Bell 1990 p69) It did much to satisfy the demands of 'The New Right' in politics, introducing the potential for 'business methods' and 'market forces' to influence the delivery of education. As Bell pointed out: "The elements of this market are choice, competition, diversity, funding and organisation." (Bell 1990 p61) New management responsibilities were an inevitable outcome of the Local Management of Schools.

The identification of the new management responsibilities and skills required for governing bodies to manage within the Local Management framework came from both 'formal' and 'informal' sources. Formal sources were the documents published by individuals or public bodies 'of authority'. For example, in 1986 the Audit Commission stated that it believed that: "Head teachers have the authority, and the skills to go with it, to manage the resources allocated by the LEA." (Audit Commission 1986 p11)

This was pre-Local Management but later the Audit Commission made recommendations to allow delegation so that: "Heads and governors are able to make their own mistakes." (Audit Commission 1986 p41) It is currently argued by headteachers, and argued particularly by governors, that they do not have the skills to manage the resources allocated by the Authority and are fearful lest they make mistakes. They perceive that mistakes would directly affect the education of pupils for which they are responsible and publicly accountable.

The fear of making mistakes is a reaction to the apparent threat from new management responsibilities. Commenting on the true nature of management tasks, Levacic concisely expressed the requirements of financial management as that of a common-sense approach to management responsibilities:

In particular, it is concerned with the acquisition and allocation of financial and real resources and with using budgets to plan and control the deployment of real resources. To undertake these tasks education managers do not need qualifications in accountancy, rather they need to make common sense applications of a few key techniques and approaches, suitably adapted from the practice of management accountancy in other kinds of organisation. (Levacic 1989 p6)

This was entirely consistent with the Government's view that governors bring common sense and intuition to school management so that the needs of the school within the local community may be met. Governors do not need to bring the sophistication and qualifications of highly-paid professionals, but clearly the management training that the Authority can provide will assist them in their management functions.

Levacic's view was supported by Barber et al, pointing out that the focus on the financial aspects of Local Management should not threaten to subsume all the other ingredients of good management. Barber et al stated:

Discussions about LMS tend to focus on the financial management of the school, but the fundamental challenge of LMS to school management is the coupling of resource decisions by the school to higher attainment by the pupils. LMS therefore covers the whole of school management....and the requirements of accountability consequently apply to the spectrum of school management. (Barber et al 1989 p30)

James supported Barber's view of coupling resourcing and educational attainment, advocating that this is better done

at school level. He stated:

I would claim that to achieve the most effective teaching there must be proper management of people and financial resources, as well as of the curriculum, and this must be done as far as possible within the school. (James 1988 p51)

The framework within which Local Management will operate will mean that management responsibility is extended considerably. Thomas noted how this will affect headteachers specifically:

A consequence of financial autonomy is to increase the influence of heads on this (teachers) resource and also to extend control over other items in the budget by allowing virement between heads of expenditure. (Thomas 1984 p1)

Referring to headteachers specifically within a multi-level management responsibility framework, Humphrey and Thomas pointed out that time management becomes a more important aspect of the management 'equation':

While it has been suggested that the greater control over the mix of resources enhances the head's role as an educationalist, it might be argued that the time taken by autonomy for purposes of financial management reduces the time available for heads to act as educationalists. Moreover it alters the nature of the skills required in head teachers... (Humphrey and Thomas 1983 p127)

Local Management will present the problem of the headteacher striking the right balance between the role of the overall educational manager and the more narrowly defined role of the resource manager. The effective headteacher will achieve the right balance.

Managing alone, the governors' and headteacher's responsibilities are extended by Local Management but they still have the option to retain Officer and Adviser advice over appointments, should they so wish. However the spirit

of the Education Reform Act is that Authority control is reduced to guidance at the most. If this reduction happens the governing body will be far more responsible and accountable for its decisions.

Lee, presenting the arguments for and against a greater involvement of governors, said:

First there is the question of whether such a wholesale reliance on governors rather than professionals is wise. There are different ways of looking at this. Arguing against any form of governor power, presumably on the grounds that non-professionals are inept or a liability, would be to cast doubt on the whole local government system where similar amateurs also control and guide public services. It seems unlikely that many would take such an extreme, elitist view.

On the other hand the argument might be that governors have potential: they are able but inexperienced. If this is so, the emphasis must be on governor training. (Lee 1990 p26)

The extension of responsibility and the management skills required to effect a balanced managerial role will require governors and headteachers to manage the whole of the school. Each school will in future stand alone from other schools, effectively as a 'self-financing school'. The school managers should have the management skills necessary to identify its unique, particular and peculiar educational requirements and the skills necessary to identify how these should be resourced. As Packwood stated:

With maximum delegation of authority the governing body, while still ensuring that prescribed policies are followed, is delegated some authority to shape the school on behalf of the various interests with a stake in its work.... This could mean that it is involved in determining the objectives of the school and in taking primary decisions, such as the selection of staff, the nature of the curriculum and the allocation of money. (Packwood 1988 pl57)

These responsibilities are being introduced within the

context of significant National Curriculum changes and the possible introduction of teacher appraisal mechanisms which add to the complexity of the changes in the educational environment.

Financial management will demand skills of planning and budgeting to support the education process and framework within which a school operates. It is the relationship between financial skills and other management skills which will determine how successful Local Management is. Financial skills alone will not bring about success; educational management without financial experience would be similarly hindered. But in schools the vital third element, the central 'dynamic', is the education process. The management skills required to balance financial, general management and curricular issues are complex and constitute much sought-after qualities in any educator.

Coopers and Lybrand observed that cultural and philosophical changes are demanded by the introduction of Local Management:

The changes require a new culture and philosophy of the organisation of education at the school level. They are more than purely financial; they need a general shift in management. (Coopers and Lybrand 1988 p5)

Considering that culture tends to be the product of an evolutionary growth, the four year time scale for the implementation of Local Management, and therefore the time scale for acquiring skills, new philosophy and management, is possibly too short to be conducive to a well-planned strategy. Caldwell and Spinks predicted a longer learning period for management based on their experiences in

Tasmania. Caldwell and Spinks commented:

A school ... may require five to eight years before collaboration at Level 8 ("Headteacher, staff and community decide through a formal structure such as a school council or board of governors") is achieved with efficiency and effectiveness. (Caldwell and Spinks 1988 p60)

If a five to eight year timetable for the wider involvement of the community is applicable in England and Wales, it is questionable whether the headteacher will be able to acquire the new skills of being able to: "Understand, initiate, assess, consult, decide, record and evaluate," as Hill (Hill 1988 p17) has identified will be necessary. Before the headteacher has established a fully effective working relationship with one governing body, a new governing body may have been elected. The effectiveness of the management process will depend upon the scale of the turnover of governors at the end of their term of governorship, coupled with the headteacher's ability to build new relationships quickly. Until practice has proved otherwise, it has to be anticipated that a cyclic replacement of governors might be counter-productive to good management. The headteacher could be critical in managing this process.

Stewart identified a range of quite sophisticated management skills that will be required by senior management. He stated these skills as being:

Resource analysis, organisational analysis, staff appraisal, counselling, developing information systems, planning and programming, influencing, negotiating. (Stewart 1986 p31)

This range of skills has not been needed in such a complex educational environment as that which is emerging because of Local Management, coupled with the introduction of the

National Curriculum. The Circular added a further new management skill, that of the "indicator", stating that:

In order to plan effectively and to monitor the effects of their decisions about the deployment of resources, governing bodies and head teachers will need to develop their own school-based indicators, with advice and support from the LEA. (Circular 7/88 1988 p31)

The increased responsibilities and increased skills required to carry out these responsibilities identified above in Section Five are from the 'formal' sources of documentation and discussion. There are however quite important 'informal' sources such as Governors' and headteachers' perception of increasing responsibilities coming from the daily experience of managing. Before Authority training was provided, in carrying out their increased responsibilities school management was possibly learning from its mistakes, as Cambridgeshire had stated pragmatically would have to be the case. This provided a cumulative experiential learning effect for governors, headteachers and senior staff, new skills that they would need emerging from their daily experiences.

Additional informal information about new responsibility came from a number of sources outside the remit of the normal governor training programme and this reinforced or challenged their perceptions of new management responsibilities. For example governors in schools located relatively close together were able to meet as a 'cluster group' and exchange management experiences. This exchange generally contributed to their learning curve, though it was rarely perceived as obvious 'training' in a formal sense.

Other sources of information on increased responsibilities were the press. Information ranged from the selective style of tabloid journalism, high-lighting the less fortunate aspects of schools' experiences, to the more analytical editorial comments on educational matters in the 'educational press', or in the range of newsletters, journals and pamphlets produced by the many supporting organisations such as the National Association of Governors and Managers (NAGM).

This study argues that the consensus of education researchers, writers and consultants, supported by informal sources of educational commentary, is that new skills will be necessary to support new responsibilities as education moves into the Local Management of Schools era. Ranges of skills (analysed in Chapter two) will be required at various management levels in individual schools so that schools can manage and deliver an appropriate National Curriculum and respond to the broader needs of the school and the community. The management of education within each Authority will move from central management to management within the local community and this will only be fully effective if a training programme offers to deliver the range of skills and competencies that managers require. An analytical matrix of these skills and competencies will be presented in Chapter Two, Section Six.

SECTION 6. THE IDENTIFICATION OF MANAGEMENT TRAINING NEEDS.

The central theme of Chapter One is the demonstration of the need for a study of management training for governors, headteachers and senior staff in preparation for Local Management of Schools. The specific theme of the first three Sections was responsibility. Section One considered the historical context of school management; Section Two and Section Three discussed growing responsibilities in this context.

Section Four analysed the management skills that existed before Local Management; Section Five analysed the new skills that are going to be needed for a school to manage without the direct influence of the Local Authority.

It is logical to progress from the identification of the new management skills required for Local Management to the process of acquiring them. Chapter Two will survey the training needs identified so far in the Papers published or circulated by a variety of educationalists and researchers, and those published by the Government. The Chapter will also look in greater depth at the management training needs identified by a number of Local Education Authorities, analysing in particular Authorities that have run pioneer schemes and have had longer to consider management training strategies, and financial management training within that context.

CHAPTER TWO

PUBLISHED RESEARCH INTO MANAGEMENT TRAINING AND PUBLISHED MANAGEMENT TRAINING PROGRAMMES IN PREPARATION FOR THE LOCAL MANAGEMENT OF SCHOOLS.

PREFACE: The Chapter will consider the broad issues of training that have been debated over the last fifteen to twenty years. The Chapter will attempt to identify an emerging consensus and a growing 'weltanschauung', focusing on financial management training where appropriate.

Section One will examine general management training theory and objectives, as identified by researchers and educationalists, and its practical development particularly in the last ten years.

Section Two will make careful reference to pioneer Authorities to examine the content and recommendations or observations made about training as their schemes of Local Management developed. The results of initial surveys of training needs carried out in Norfolk and South Glamorgan will be focused on as case studies.

Section Three will study the Education (Number 2) Act 1986 and the Education Reform Act 1988 and associated Circulars to identify the main direction they indicated training should take.

Section Four will look at a small sample of Authority Submissions to consider how the management training strategies have been laid out for the Secretaries of State.

Section Five will examine the content of a number of training material packages produced in 1988 and 1989. Authority Submission outlines for training may have been

based partly on the structure and content of the commercially produced material.

Section Six will summarise the new skills that governors, headteachers and senior staff will need to acquire through training to meet their new responsibilities.

Section Seven will examine the link between a rather subjective training analysis and the social science research approach of methodical data collection, analysis, interpretation and commentary. The social science approach is tackled in the succeeding Chapters of this study.

SECTION ONE: GENERAL MANAGEMENT TRAINING: THEORY AND PRACTICE IN THE LAST TWENTY YEARS.

Before examining Local Management-orientated training in later Sections, this Section will review published theory and identified management training practice. First, management training for teaching staff will be looked at. Second, governing bodies, receiving delegated responsibility relatively recently, will be considered. Two questions will be posed: What was the purpose of the training? How was training delivered in practice?

For headteachers and teaching staff the provision of management training until ten years ago tended to concentrate on management of the curriculum, the training addressing pupil management and the content of the curriculum 'subjects'. The focus was on narrow, vocational skills. In some ways the training was an extension of Teaching Certificate or Post Graduate Certificate preparation for a teaching career.

Management education was broader, providing senior staff and curriculum leaders with skills to develop cross-curricular resourcing strategies, or inter-discipline thematic work modules, for example. However during the late 1980s the emphasis changed: management training and management education would not entirely satisfy the needs of Local Management in the 1990s. There was an awareness of the need for training for the management of the school as a complex organisation of human and physical resources, including the central curriculum. This need will be considered 'management development', a concept examined in Chapter Six.

As Wallace and Hall, 1989, explain in their review of management training, the NDC calculated that of the 1,600 teachers on award-bearing courses in 1979/80, only one third were specifically management courses. The remainder, therefore, were curricular or 'operational', as outlined above. After "Teaching Quality" was published by the DES in 1983 the focus shifted to management training rather than curriculum training as a priority, with 6,000 headteachers and senior staff on One Term Training Opportunities (OTTOs) between 1983 and 1987. After the 1985 White Paper "Better Schools" had attempted to make INSET more coherent, the introduction of LEATGS in 1987 made management training a national priority and: "Shifted responsibility for quality control to the LEA." (Wallace and Hall, p165)

The need for management training was recognised by the Audit Commission when outlining recommendations for increased delegation to schools. Their view was of a structured approach to management training as part of a promotion sequence:

Until they become deputy heads, teachers are not likely to have any management training at all; as deputy heads they will be expected to learn by observation - as the present head did before them. This is evidently unsatisfactory and the Commission suggests that completion of appropriate management courses should be an essential requirement for an appointment as deputy head. (Audit Commission 1986 p44)

When a headship has been achieved the Audit Commission recommended that: "Staff support and management training should be made available to headteachers in those schools to be given additional delegated powers." (Audit Commission 1986 p41) In the 1990s it is suggested that training could

be part of a cumulative accreditation scheme, as supported by the National Association of Head Teachers and the Secondary Heads' Association, or as part of the Management Charter Initiative.

The School Management Task Force (SMTF), set up in 1988 to advise the Secretary of State, and the NDC focused the objective of training on substantive management tasks, for example the management of change or decision-making. While there was a varied approach to needs identification and HMI reported that the monitoring and evaluation of courses was weak, the main thrust of training was a more carefully structured management development. This would support the enhanced Local Management skills identified in Chapter One. However, Wallace and Hall noted there was:

Much less adequate provision for the large numbers of staff with middle management responsibilities, especially in primary schools. (Wallace and Hall p171)

The development of systematic support for managers in schools has become heavily orientated towards the immediate needs generated by the education reforms, at the expense of the longer term development of heads and senior staff. (Wallace and Hall p173)

In summary, during the 1980s the purpose of management training for teaching staff became that of organisational management, as a national priority it became more structured, but the 1988 legislation deflected the training away from long-term development needs of both senior and middle management. It is this last aspect which this study will address in Chapter Six.

Major developments to enhance headteacher and teaching staff management while the essential strategic management was

being delegated to governing bodies, in which the headteacher and teacher representatives would only be a small caucus, is an apparent paradox which training will need to resolve. The release of training resources through GESTs in the 1990s may provide Authorities with a greater flexibility for corporate management development of headteacher and senior staff with governors.

Experiences of 'Local Management of Schools' in the United States in the late 1960's helped to identify (by implication) that the objective of training was supporting delegated responsibility to enhance education delivery. James and Levin perceive training and experience as crucial for an effective transfer of control and responsibility, i.e. the 'assuming of new roles', to local managers, and observed:

To suggest that effective autonomy among community schools can be easily accomplished is to ignore some formidable stumbling blocks: that school principals and administrators (i.e. 'governors') within the school have neither the training nor the experience to assume their new roles. (James and Levin 1970 p265)

Brooksbank identified this transfer as a problem, but defined one objective of training as reconciling the potential tension between professional educators (school and Authority) and lay governors, commenting:

This particular problem (i.e. professional v lay) is thus a paradigm of the difficulty of reconciling a range of legitimate interests in the management of schools - respect for professional judgement, an awareness of the insights which can be brought to education by lay people, and a recognition that the local authority, without exercising aggressive, interventionist powers, nevertheless has responsibilities which it can devolve or share, but not abdicate. (Brooksbank 1980 p202)

However, as the responsibilities of governing bodies increased significantly because of political education philosophy, Sayer and Williams perceive a further dimension of the professional-lay reconciliation. They believe that the objective of training for headteachers and senior staff is to equip them to carry out operational tasks rather than to contribute to strategic planning. Sayer and Williams stated:

What seems to be on the agenda of the Secretary of State is the training of heads and senior staff for the execution of policy, not for its planning and development. So heads and deputies have a task force of industrialists and educationalists who are intended to advise on training for local management of schools, national curriculum and other legislated initiatives. That is not what I understand as developing management. It would doubtless improve the operational, perhaps touch the tactical, but does not appear to relate to strategic policy formulation in schools. (Sayer and Williams 1989 p143)

Sayer and Williams have thus added the objectives of the political system to the tension between professionals and lay governors detected by Brooksbank. If Sayer and Williams are correct, then by implication the objectives of governor training will be to provide strategic skills, and governors, with the "task force", will have a 'higher order' training requirement than the professionals with operational tasks in the school.

It is difficult to equate this two-tier management model with the responsibilities for management that headteachers, and senior staff at least, are anticipated to take on in the 1990s; recent changes have clearly enhanced their potential for developing strategic planning roles also.

It is noticeable that the Audit Commission recommendation

leaves open the decision as to where the governors fit into the management courses. It could be argued that to train educators and governors separately is divisive, particularly as they will have to manage the schools corporately. The issue of joint or separate training will be further examined in Chapters Four and Five.

Coopers and Lybrand warned that the whole management training programme could be made more difficult to deliver because of different 'learning curves' of training course participants. Coopers and Lybrand observed:

Nevertheless the development of governors is likely to be a slower process than for heads and staff and implementation plans will need to recognise this, not only in the provision of training and support for governors but also in phasing-in responsibilities. (Coopers and Lybrand 1988 p34)

A method for compensating for different learning curves, and a suitable objective for a training programme, is that of encouraging 'clients' to identify the purpose of the training, thus giving them part 'ownership' of the training process. The National Association of Governors and Managers support client training need identification and stated:

It is a good idea to ask governors what they themselves want as governors cannot be made to attend courses. The topic could be introductory information for new governors or more specialist topics... (N.A.G.M. 1989 p1)

The identification of training needs can be time-consuming and, if client expectations are to be fulfilled, requires adequate resourcing to provide the courses requested. Resourcing is an issue which Harding commented on:

The provision of training courses for governors has until now at least been a somewhat haphazard affair: some authorities commit significant resources to it, while others tend to virtually ignore it. (Harding 1987 p251)

Ultimately the content of training and the method of delivery to the clients are important if appropriate knowledge, skills and attitudes to support responsibilities are to be fostered in headteachers and governors. However, in discussion the purpose and methodology of training has often been imprecise. For example Taylor, in "A New Partnership For Our Schools", stated:

Fortunately a growing number of authorities are recognising the need for training and are taking positive steps to establish training courses and issue written guidance in the form of handbooks and manuals. (Taylor 1977 p89)

We recommend that all LEAs should be required to ensure that initial in-service training courses are available for governors. We also recommend that:-

- (i) All governors should have a short period of initial training as soon as this is practicable;
- (ii) All governors should attend in-service training course regularly;
- (iii) A person to be designated by the LEA should be responsible for co-ordinating the training of school governors. (Taylor 1977 p91)

Other than Taylor's reference to "written guidance" which might suggest a training strategy including home-based learning, there was no clear indication about setting aims and objectives, content or methodology. In contrast, Burgess and Sofer were much clearer about the purpose and general content of training, particularly where skills were required. They proposed a training programme that embraces a range of skills:

1. 'Students' should begin to get used to committee procedure and how to use it.
 2. Begin to understand how to define the needs of an individual school and how to go about seeing them answered.
 3. Learn to find their way about laws and regulations.
 4. Should begin to explore their function as a link between school and the community.
 5. Learn how to keep a watchful eye on the bureaucracy of the education service.
 6. Learn how to ask constructive questions about 'conduct of the curriculum'.
 7. Learn how and when to translate discussion into action.
- (Burgess and Sofer 1978 p95)

For Local Management preparation this would form a reasonable introductory training programme, lacking only in modules on financial management and an introduction to the National Curriculum which, in 1978, Burgess and Sofer could not have anticipated would be required.

Knight has considered financial management training and the method of delivery in terms of a mixed group of participants. He said that:

There is no reason why short courses on educational finance should not develop in the way that educational management courses have grown..... The ideal mix would be drawn from treasurers, educational administrators, advisers, heads, bursars, and heads of department. (Knight 1983 p208)

A balanced membership of a more in-depth, problem-orientated course would help compensate for differing learning curves and would lead naturally to the experiential learning format of adult training that educational management courses have developed. (Adult training methodology will be examined in Chapter Six.) A balanced membership could also reinforce the importance of participants sharing perspectives if the connection between financial resources and the education process i.e. the delivery of the National Curriculum, is to

be supported. Good management of financial resources can enhance the education process; poor management can inhibit it.

Commenting on how training is to be delivered Sallis said:

The biggest debate among local authorities is probably whether governors should be trained in fairly large randomly mixed groups, or whether it should be much more precisely targeted at the individual governing body or cluster of schools. All training should be interactive, encouraging participants to show independence, contribute, and identify their own learning needs. (Sallis 1989 p17)

Acknowledging the slower training pace for governors, Coopers and Lybrand detected a 'core curriculum', commenting that:

Although the training programmes will need to have different emphases for the different groups, there will be much in common - particularly as it will be important for everyone involved to understand the roles and perspectives of others. It may well make sense to arrange some joint training sessions. The topics to be covered will include:

- principles of good management (objectives, plans, resources, monitoring, accountability);
- basic principles of the local management of schools;
- main features of the local scheme;
- decision-making cycle and timings;
- relationships between, and roles of the various parties;
- budgeting and financial control;
- relevant provisions of employment law;
- support and advice available and how to make best use of them;
- forms and information flows;
- information technology.

(Coopers and Lybrand 1988 p47)

Coopers and Lybrand guidelines were prescriptive and emphasised the joint training possibility. Financial resource management training could be a component part of each of the ten categories of training identified by Coopers and Lybrand, presented above.

Even when objectives are set and training content and methodology has been decided upon, Knight identified the logistical problem of identifying training 'tutors' as significant. Knight commented that the need for school governors to acquire skills and expertise:

....implies an explosion of training. Initially this will be troublesome since the number of 'experts' available is very limited. Soon, though, good training materials and advisory support should be forthcoming. Eventually, qualifications in aspects of LFM may develop. (Knight 1988 p148)

The logistical problems of training explain, perhaps, why the Secretary of State's Circulars for guidance did not go so far as Taylor's recommendations on the extent of training. Since 1986 the number of governors actively involved in school management has quadrupled, with parent governors and co-opted governors from the local business community presenting an almost exponential growth in the demand for training. The logistical problems of giving "initial training as soon as practicable", then "regular in-service training", in a period of four years is a significant task. After four years the training cycle may need to begin again. This has major resourcing implications in terms of materials and the personnel to deliver the training. It should be noted that Taylor's recommendation for Authorities to appoint governor training coordinators is only now becoming standard practice as Authorities develop their personnel structures to respond to the Education Reform Act.

James and Levin, above, expressed concern that governors would not have sufficient experience to take on new responsibilities. Kogan felt that experience could be shared

and pointed out:

Many governors, too, obviously possess the capacity to extrapolate from what they have read or encountered elsewhere, including experience as a governor of other schools, to the business of their own governing body. (Kogan 1984 p91)

However, while some governors are quite experienced, particularly those in the Church sector voluntary aided and controlled schools, they have not experienced management in their new role in a rapidly changing educational environment. These changes are too fundamental to substitute experience for training. As shall be seen in Chapter Six, it is the shared experience of adults in a training situation which is one of the key factors in their learning curve.

Concluding this review of management training, it is worth considering the traditional, central role that Authorities played in its provision. (Chapter Six will consider the relevance of the traditional role in the future.) When Authorities have established the purpose, content and methodology for training, Coopers and Lybrand identified the considerable importance of the Authorities' attitude to training for its success. Coopers and Lybrand commented: "It is positive attitudes on which LMS will stand or fall and these can only be achieved with adequate training." (Coopers and Lybrand 1988 p6)

The responses of pioneer scheme Authorities and some other Authorities to the challenges of Local Management training, and attitudes they displayed in their approaches, may help to identify the extent of the paradigm shift required to change from pre-Local Management to Local Management implementation philosophy. The training needs identified

after several years of piloting schemes may be a pointer to the direction that Authorities may need to take; this will be looked at in Section Two.

SECTION TWO: THE IDENTIFICATION OF MANAGEMENT TRAINING NEEDS IN SAMPLED AUTHORITIES.

The Metropolitan Borough of Solihull published a "School Autonomy Scheme Handbook" (Solihull 1988) based on pilot school experience of Local Management begun in 1981. It was recommended by the Director of Education to, "Heads and Officers as the definitive reference manual for the Solihull Scheme", but has no references to training, to the Authority's Autonomy Assistant, or how headteachers and governors should prepare for their responsibilities.

An indication of Solihull's strategy for delivery and the content of management training is given by Humphrey and Thomas, identifying the important role of the Autonomy Assistant:

The Autonomy Assistant has been much involved in school-based training so that, from suitable techniques of recording orders and invoices, information is obtained on payment flows which contribute essential management information to the budget decisions of heads and other teachers with responsibility in this area. (Humphrey and Thomas 1985 p419)

The emphasis was on financial management training, and the school-based delivery was possible while the number of schools was relatively small. The use of the Autonomy Assistant, and in particular the advantages of personal contact that developed during school-based management training and support, was appropriate in the pioneer phase of Local Management. It should be noted that this was before governing bodies has been constituted in their present form, and therefore the Autonomy Assistant could concentrate her efforts on supporting headteachers and senior staff.

In 1986, when the Solihull scheme was extended, it was noted

Finance and Administration had identified the need for a training strategy organised on at least three levels. They believed that content should be covered in:

1. A general seminar on principles/aims for head teachers/governors/bursars;
 2. A seminar on fundamental financial principles for head teachers/bursars;
 3. A seminar on detailed financial processes and administration for head teachers/bursars.
- (Cambridgeshire 1985 p5)

As in Solihull, the content was very much finance-orientated training but, unlike Solihull, did acknowledge and make specific reference to the need to include governors in some of the training seminars.

Hill's involvement in Cambridgeshire as the L.F.M. Project Leader placed him in the position of being able to identify training needs, "A critical area for successful implementation." (Hill 1988 p9) His previous experience as a pilot school headteacher, and therefore in a working relationship with other headteachers, enabled him to assess what training the schools would need. For headteachers, Hill felt that training should be for activities such as:

- a) understanding what is provided and how much should be spent.
- b) initiating work to reconsider resource allocation.
- c) assessing alternatives and their cost.
- d) consulting with those staff affected and those officers properly involved.
- e) deciding whether to change, and what, when and how.
- f) recording the decision.
- g) evaluating the effectiveness of the change.

All the above activities should, of course, be part of the present management training for heads and are not solely confined to L.F.M. (Hill 1988 pp 9-10)

It is the last sentence quoted which reveals the paradigm shift caused by the emerging understanding that financial

autonomy must be set in the much broader educational management structure established by the Education Reform Act. To compare with Solihull and Cambridgeshire, the details of management training in two case studies known by the author will be looked at. Like Solihull and Cambridgeshire, Norfolk County Council had a pilot scheme before the Education Reform Act; in contrast South Glamorgan faced its management training preparation when the Reform Act was on the Statute Book.

Norfolk County Council began a scheme of financial devolution to schools in 1985 with three secondary schools, extended a year later to a total of five secondary schools. In 1987 three primary schools were added to the pilot scheme. Though the Norfolk scheme was not publicised nationally, it is a suitable case study of an Authority which had monitored the progress of its neighbour, Cambridgeshire, with interest and had learnt several important lessons. Norfolk's internal memoranda illuminated the growing Authority awareness that training would be necessary, and how a training strategy should be developed.

For the pilot secondary schools the Chief Education Officer wanted training, but also identified that increased support would be needed at County Hall:

Staff support and management training for head teachers in those schools to be given additional delegated powers would be made available. (Norfolk C.C. 1985 p31)

When I reported earlier this year I advised that introducing local autonomy would increase the need for financial expertise and training and there would be staffing implications both at cost centres (i.e. schools) and within the County Education Department. The commitment and enthusiasm of the pilot schools will be critical. (Norfolk C.C. 1985 p36)

In Solihull and Cambridgeshire there was an apparent concentration of training effort on headteachers, with only passing reference made to governors. In contrast, in Norfolk the internal memoranda of the Authority's Training for Governors Steering Group addressed the task of developing a training strategy to include governors, training needs being identified by Area Officers. A memorandum noted that:

The Chairman informed the group that she had had a successful meeting with the five Area Officers. They had worked through the problems of pressure on their own and staff time. It had been agreed that one course per Area would take place in the Spring Term, 1986. (Norfolk C.C. 1985 p1)

The Authority Area Officers were beginning to develop a system for gathering training needs information rather than relying on a subjective assessment by individuals. To do this one of the Area Officers had carried out a questionnaire survey on governors' needs in his Area of the County and reported that:

More than 71% of governors in primary schools thought that training courses would be helpful, but only 50% of secondary governors agreed. However approximately 80% of both primary and secondary governors would be prepared to attend training courses. (Norfolk C.C. 1985 p2)

This difference in attitude between primary and secondary governors perhaps reflected the different 'learning curves' identified by Coopers and Lybrand and mentioned earlier in this Chapter. If so, secondary school governors perceived

themselves to be higher up their own learning curve and were therefore not so prepared to acknowledge the value of training.

The Norfolk questionnaire also revealed differences in primary and secondary governors' needs as to the venue and timing of training meetings. The memorandum continued:

In order, therefore, to make the best use of resources, there was a need to offer different arrangements for different areas. It was felt that in particular Chairmen needed to be trained and that because the role of the Clerk to the Governors was not always appreciated, they should also receive some training.

Both primary and secondary governors agreed that courses should cover the following:-

- 1) Duties and responsibilities.
- 2) Interviewing and appointment of teachers.
- 3) Organisation and management of the school.
- 4) Finance. (Norfolk C.C. 1985 p2)

This is an early indication of the detailed content that the Authority was proposing to deliver to governors. It should be noted that finance is one module in a package which primary and secondary governors felt necessary to enhance their management competencies. Content detail will be compared between Authorities in later Chapters of this study.

In Norfolk's 1985 Education Support Grant bid the training course was described as:

Intended as a swift introduction to many of the topics likely to be encountered by governors in their first term of office. Supplementary sessions or longer seminars, residential as necessary, are planned as follow-up in order to explore in greater depth topics identified by governors as being of specialist interest. (Norfolk C.C. 1985 p2)

The training needs identification, the length of courses and

the need for in-depth training in specific topic areas will be considered in Chapters Four and Five.

In Norfolk, the LMS Project Leader wrote to a small but representative sample of secondary headteachers who expressed a preference for training in clusters geographically, for separate training of governors and headteachers, and resource allocation as a priority for training. (Appendix 5)

The results of the survey illustrated how general training strategies and topics can be broken down into more refined models of training delivery. The survey also reflected a bias towards secondary headteachers in helping to identify the training strategy, perhaps because the LMS Project Leader had been a pilot secondary school headteacher.

While it is of value to examine some of an Authority's internal discussion papers, an analysis of Education Committee reports may help to focus on the Authority's 'formal attitude' to training. After the Education (Number 2) Act had formalised governing body responsibilities, Norfolk's Chief Education Officer reported to the Education Committee that:

There is a need to provide some programme of systematic support for all new governors. There is a need to recognise the diversity of governors, their personal circumstances, talents, and past experience. There is a need to enable them to work as an effective team, in co-operation with their school and its head teacher. (Norfolk C.C. 1987 p1)

The report went on to identify the aims of the general guidance programme and indicated the range of methodologies in providing training. It said there should be:

- a range of printed materials, like a handbook or guidelines on different topics;
- a range of different learning resources, for example employing video or local radio;
- a programme of training events on different topics. (Norfolk C.C. 1987 p3)

A year later the Authority's planning had progressed to the point at which Norfolk Education Committee would consider the third phase of the training programme, designed to cover governing body meetings in November 1988 and interviewing skills in Spring 1989. The Education Committee would also consider future themes of financial delegation, the curriculum, testing and staff appraisal. The experience of three years' pilot school delegation and management had sharpened its perception of training needs and delivery strategies. The Committee was advised that:

One of the most important aspects of all is to make training part of practice, rather than something which happens out of context. This may mean a governing body training as a group, calling on information or guidance which will enable it to make a more informed, more reflective view of an issue and to take shrewd, consistent long-term action. (Norfolk C.C. 1988 p5)

In comparison, South Glamorgan was an Authority which had not undertaken a pilot scheme of delegation. The Authority was faced relatively suddenly with the task of identifying its training needs. Officers identified training needs by approaching headteachers and governors during public meetings which were part of its consultation programme about the draft Submission to the Welsh Office. All Authorities were charged with consulting, South Glamorgan organising four geographically-based public meetings which were arranged at the beginning of the consultation process. Approximately 1,000 headteachers and governors out of 2,500 in total attended.

Headteachers and governors were invited to fill in a short form outlining their training needs as perceived in the light of the information provided earlier in the meeting. They might also include those training needs that they had identified from previous information gathered about Local Management. The forms allowed headteachers and governors to describe training needs in their own words. There was, therefore, a degree of subjective interpretation as Officers analysed the results. But, within the time constraints, it was felt that the responses gave a clear enough indication of needs and so an introductory training programme covering the six most requested training topics was designed.

The analysis of the responses (Appendix 6) revealed that "Finance", "Curriculum" and "The Law" were priority areas for increased 'knowledge'. "Staff Appointment" was the priority for increased 'skills' and the "Roles of Governors" was a further priority area. Chapters Four and Five of this study will compare this programme with those of other Authorities in England and Wales.

South Glamorgan Officers began to consider the locations for management training and the question as to whether governors and headteachers should be trained together or separately. To judge reaction to separate or joint training the headteachers were addressed at a South Glamorgan headteachers' conference. In the six areas of training need identified during the public meetings survey, the results from the headteachers' survey indicated that they generally perceived that their management training should be with senior staff and with governors (Appendix 7). The National

Curriculum was a training area where a variation in emphasis was detected however, with a 28% response that training for headteachers and senior staff should be delivered separately from governors.

At that time, the governors did not have a comparable conference so that South Glamorgan had no simple method of identifying their wishes about separate or joint training.

Section Two has considered Cambridgeshire and Solihull which began pilot schemes in the early 1980's, Norfolk which began its pilot scheme in the mid-1980's, and South Glamorgan. A pattern of training had begun to emerge. In summary, the importance of headteachers and governors in identifying training needs in consultation with Officers had been stressed. There had been a slight shift away from concentrating on headteacher training to training governors in a partnership with headteachers. Similarly there had been a shift away from a finance-orientated training programme to one which embraced a wider range of education-orientated training. Within this context there had been a growing awareness of the 'levels' of training that should be provided.

It is relevant at this point to consider the Education (Number 2) Act, 1986, and the Education Reform Act, 1988, with Circulars 7/88 (and 36/88 in Wales) to determine the extent of training for new management responsibilities anticipated by the Secretaries of State. Section Three will comment on these two Acts.

**SECTION THREE: MANAGEMENT TRAINING OUTLINED IN THE
EDUCATION (NUMBER 2) ACT, 1986, AND THE EDUCATION REFORM
ACT, 1988.**

The Education (Number 2) Act, 1986, provided very little information or guidance on management training in spite of the fact that, as Reed and Hall pointed out: "The thrust of this Act too was to strengthen the independence of governing bodies, and the accountability and responsiveness of the school to its governors and the community." (Reed and Hall 1989 p12) Other than providing information on the instrument of government, the articles of government, and other information that the Authority considered appropriate, the Local Education Authority should ensure:

That there is made available to every such governor (free of charge) such training as the authority consider necessary for the effective discharge of those functions. (Education (Number 2) Act, 1986 p61)

No mention is made of headteachers or senior staff in this training context. By not making a prescriptive statement the Act gave considerable flexibility to Authorities to develop training programmes as their Local Management experience developed. In contrast, for an Authority like Norfolk the commitment to a training programme already existed so the Act formalised existing practice.

Circular 7/88 (36/88 in Wales) offered 'guidance' on the Education Reform Act: Local Management of Schools and discussed the resource implications. It stated:

Training programmes and the provision of specialist advice will need to be redirected to support governors and head teachers in managing delegated budgets.... In order to help LEAs to meet those needs, the Government has announced proposals for specific grant support.... for the

introduction of local management, the training of governors and LEA inspection. In addition, substantial resources are being made available for the training of head teachers through the LEA Training Grants Scheme. (Circular 7/88 1988 p7)

In the light of the research discussed so far, the desirability of joint governor-headteacher management training brings into question the wisdom of the allocation of separate sources of funding outlined in the Circular. Whether separate funding reflected separate training practice before Local Management, or whether it reflected the Government's fear that unless separate resource allocations were identified governors (or headteachers) could miss out in the overall allocation for management training, is not clear. Either way, the Authorities had to satisfy the Secretaries of State in their Submissions that training strategies had been thought through.

Circular 7/88 indicated the broad strategic arrangements that Authorities should outline when submitting schemes, including:

A description of the arrangements proposed for the implementation of the LEA's scheme, including its date of introduction, phasing arrangements and the provision for support and training of governors, head teachers and school staff directly concerned. (Circular 7/88 1988 p8)

It must be for each LEA to decide on the form that such training and support should take having regard to its particular circumstances. (Circular 7/88 1988 p30)

Compared with the Education (Number 2) Act, 1986, the Education Reform Act, 1988, was slightly more specific about the personnel to be trained, but still left Authorities to decide the content of training. It was perhaps surprising that no references were made to short

term financial management training specifically, though this could be subsumed under 'management training', the theme implied by the Circular.

The Circular outlined the Secretary of State's wish to support training initiatives and outlined the resources which reflected his firm commitment to do so. However, considering that relatively few Authorities had a good resource base of training materials already available, the allocation (of approximately £20 per year per governor available in South Glamorgan, for example) was a constraining allocation. And, starting without experienced governor training personnel, many Authorities had to use their discretion about spending perhaps 30% of their Education Support Grant to appoint a full-time governor training co-ordinator. It was not easy for all Authorities to implement even modest training programmes "to governors across the country" with limited resources.

At this point this study will briefly focus on the perceived need for financial management training specifically, considering Authority statements on financial management training outlined in Local Management Consultation Documents and Schemes. The study will review in more detail sampled Authority approaches to financial management training, and other sources of relevant material on finance.

SECTION FOUR: GENERAL MANAGEMENT TRAINING NEEDS AND FINANCIAL MANAGEMENT TRAINING NEEDS. EVIDENCE FROM SAMPLED AUTHORITIES.

Having considered Cambridgeshire, Solihull and Norfolk in detail, an analysis of a slightly wider sample of 'non-pioneer' Authority Consultation Documents and Submissions will help identify the proposed development of financial management training within the overall management training structure. Seven County Authorities, one Metropolitan District and one Outer London Borough were sampled: those that South Glamorgan had exchanged published Schemes with.

Several Consultation Documents, Drafts and Final Submissions either did not mention training, for example Hampshire, or tended to be very general in their training programme statements. Brent stated:

Through its officers, inspectors and support teachers of various kinds, the LEA is required to give heads, teachers and governing bodies a wide range of practical assistance and advice, and to provide training. (Brent 1989 p9)

Another 'broad brush' approach was that of the Gwent Submission, stating:

The Authority's plans for governor training will include provision to equip governors to participate in a continuing process of evaluation in relation to their schools. (Gwent 1989 p94)

West Glamorgan's Submission outlined plans for a range of support activities for schools. Governors' support or training was mentioned specifically as: "An introductory seminar session of not less than two hours for all Chairmen and Governing Bodies." (West Glamorgan 1989 p45)

Considerably more expansive, though apparently subsuming

financial management training under the general management heading, Avon stated:

Avon is proposing to provide a comprehensive programme for Governors, Head Teachers and Deputy Head Teachers, other School Teaching Staff and Headquarters Staff. On some occasions, members of some or all of these groups will be trained together to foster the team spirit necessary for the effective implementation of LMS. The type of training will depend on the particular needs of individuals and groups will range from general awareness training, to specific training in management, information technology and financial matters. (Avon 1989 p143)

The Durham Submission explained that:

Training will take the form of general awareness followed by specific training on various aspects of governors' new responsibilities. It is anticipated that governors will wish to pursue particular interests in areas such as performance review, curriculum, finance, premises or personnel and therefore specialist training will be offered in these areas. (Durham 1989 p42)

I am also currently drawing upon the experiences of the LMS pilot head teachers on the structure of subsequent LMS training. (Durham 1989 p43)

Three Submissions sampled illustrated a more detailed outline of management training, with financial management training clearly set out. Somerset announced the formation of a multi-disciplinary Implementation Team which would:

Organise a training programme for governors, heads, teaching staff, clerical/administrative staff in schools and LEA headquarters staff. The training will cover such areas as policy planning and management, staff relations, responsibility for premises, budgeting and budgetary control, and the effective use of information technology. Somerset (1989 p14)

Mid Glamorgan's Submission proposed training modules or courses, covering:

1. awareness raising (including the general principles of formula funding);
 2. financial matters (which will cover 'formula funding in detail, budgeting, financial regulations);
 3. repairs and maintenance;
 4. monitoring and evaluation;
 5. personnel matters.
- (Mid Glamorgan 1989 p122)

However, the Submission proposed that the 'personnel involved' include "Headteacher and Chairmen of Governing Body", but only for Course 1 (i.e. awareness raising). Neither the chairmen, nor the other governors, were apparently going to be 'involved' in Course 2 on financial matters.

The Leeds (1989 p67) Submission outlined modular training in four blocks. Governors could attend Block A ("General Awareness Training re Formula and Implications of 7/88") and Block B ("General Responsibilities of Heads and Governing Bodies; General Financial Implications and Procedures"). They were not expected to attend any of the eight Block C modules, one of which was, "Resourcing the National Curriculum", nor any of the nine Block D modules, one of which was, "Planning and Conducting a Budget".

The sampled Submissions thus generally failed to provide much evidence of detailed planning and a provision of a comprehensive programme of financial management training on a scale which might be expected if governors in particular, but also headteachers and senior staff, were going to be prepared for their increased responsibilities. This lack of provision is in contrast to Cambridgeshire, Solihull and Norfolk which had included financial resource management in their general training programmes since the 1986 Education

(Number 2). Act pointed the way for the extension of delegation Schemes. If the prime responsibility of schools in the future is seen as that of delivering the National Curriculum, then striking the right balance of educational and financial issues will be influenced by the depth of understanding that headteachers and governors have of their budget and its virement possibilities. Financial management training to provide this understanding would seem to be critical.

Research into management training needs in Cambridgeshire in 1988, when delegation was introduced, found that secondary headteachers placed the need for financial management training equal first in priority (with staff appointments). Primary headteachers, receiving delegation in 1990, placed it equal third in priority (behind governing body meetings and staff appointments). As staff salaries represent between 70% and 80% of a school budget staff appointments will have a high training priority and will have significant financial implications.

In South Glamorgan the need for financial resource management training became clear from verbal and written requests from governors and headteachers. Finance was a priority training area. As the Submission stated:

Training is being offered at an introductory level in areas identified by governors and headteachers and administrators; this will be a continuing programme over the four years of a governing body cycle. The Authority is identifying the requests for more in-depth training in areas where personnel have a more specific requirement in terms of technical knowledge (e.g. computers and finance) and process (e.g. National Curriculum implementation). Training will be offered in a range of venues and at a variety of times to

encourage participation by as many personnel as possible within the resourced structure. The Authority is monitoring and evaluating the effectiveness of its training and will continue to revise its training material to respond to changing needs and to improve quality. (South Glamorgan 1989 p23)

This is a more comprehensive statement than those sampled Submissions, above, in terms of its description of the methodology employed in designing the general training strategy. The Submission mentioned only three specific training needs: computers, finance and the National Curriculum.

South Glamorgan was giving one fifth of its initial governor training module time to 'Finance and Budgeting'. The Authority's monitoring of the governor training also identified finance and budgeting as a priority area with 35% of the total requests for in-depth training highlighting Finance and Budgeting.

It was evident from South Glamorgan's tutors' comments during the training de-briefing meetings that finance stimulated more penetrating questions from governors than the other training modules. Some governors wished to explore issues at a much deeper level than the tutors had been prepared for at an introductory level of training, and even what tutors considered to be relatively simple concepts of formula funding and budgeting needed quite lengthy explanations.

Sections One to Four of this Chapter have surveyed the sources of information and opinion which contributed to the emerging consensus or 'weltanschauung' about management

training needs. Financial management training was perceived to be an integral part of the overall management training 'package' in several Authorities. But it must be emphasised that the pioneer Authorities sampled were committed to a new resourcing methodology for education and this was therefore likely to enhance their desire to provide financial management training.

In these Sections the case for the need for management training for increased responsibilities has been presented. However, there is no clear, definitive Authority-wide management training strategy that had emerged. Authorities were probably still assessing the ramifications of the task of developing a workable Local Management Scheme, and how to implement the changes and provide support for the schools. Section Five will look at the training manuals which had been published at the time of the Education Reform Act and Authority Submissions. For those Authorities which purchased them, the manual contents may have provided a model for their own management training programmes.

SECTION FIVE: MANAGEMENT TRAINING MATERIALS DEVELOPED AT THE TIME OF THE EDUCATION REFORM ACT.

Five training manuals on Local Management were sampled. The manuals were published between the passing of the Education Reform Act in 1988 and the presentation of Authority Submissions to the Secretaries of State by the end of September 1989. Assuming that the manuals are still referred to, they are:

1. "Local Management in Schools. The Training Package." The LMS Initiative. Guide published in 1988, package published at two levels in 1989.
2. "The Self-managing School. Workshop Manual." Jim M. Spinks. Published in 1988.
3. "Managing Finance In Schools. (A Secondary Headteacher's Guide; A Primary Headteacher's Guide; A Head of Department's Guide.)" Gillham et al. Published in 1988.
4. "Local Financial Management In Schools. Familiarisation and Initial Training Material." Brian Knight. Published in 1988.
5. "Financial Delegation and the Local Management of Schools." Thomas, Kirkpatrick and Nicholson. Published in 1989.

When commenting on the manuals, note should be made of their relative 'profile'. In contrast to the other four, the LMS Initiative material was given high profile publicity and was effectively the 'official' manual. Produced by the corporate effort of nine local or national education bodies or associations including CIPFA, the Local Government Training Board and SEO, and launched in London with Ministerial

support and interest, it was the 'standard reference' for Authorities.

At the LMS Initiative launch the author was conscious of concern expressed by many Authority Officers about the extent of the task of training, concern tending to reinforce the importance placed upon the available LMS Initiative material. There appeared to be a general dearth of Officer knowledge about suitable alternative or supplementary sources of training material, such as the other manuals, at this time.

The rationale behind the approach to training adopted in the manuals indicates the perception of management training needs at the time of publication. First, the Section will look at the evidence for training being governor or headteacher-orientated.

The Primary Headteacher's Guide focuses far more on the involvement of governors in the management process than the two other Guides: the Guide for Secondary Headteachers and the Guide for Heads of Department, who, by definition, tend to be found in Secondary schools. The Guide mentions governors in the contents page on three occasions: "Thinking about your Governors", "What is the role of the Governing Body?", "What about discussions with your Governing Body?" These issues are then explored in the text. In contrast, governors are hardly mentioned in the other two Guides. It is possible, therefore, that this is evidence that the concept of different training strategies for secondary and primary school management was emerging, an issue which will

be considered in the research Questionnaire.

Knight's "Familiarisation and Initial Training Material" lists "possible users", and these include headteachers and other senior school staff, and school governors though they only use "selected material". Knight does not make it clear which material should be selected for the governors, however. For example, the contents page includes "The role of governors" but the two pages referred to in the core material do not specifically mention governors at all. The manual thus gives a rather ambivalent message about the inclusion of governors in a course which uses the initial training material.

In contrast to the other manuals sampled, Knight also lists possible users in Local Authority Offices and includes Education Officers, Officers of treasurers' departments and advisers and inspectors, "Concerned with the effect of LFM on schools." (Knight 1988 pI) He can see the need for all personnel involved in education to be "familiar" with the changes and the devolved management responsibilities that they encapsulate.

In their manual Thomas, Kirkpatrick and Nicholson detect the tensions between professionals and lay governors, implying that joint training should minimise the tensions. They advise:

The governors should play a full role in deciding matters affecting the budget and in many schools in Solihull the governors' subcommittee takes a keen interest in the budget decisions of the school, but at the moment appears to be strongly influenced by the recommendations of the headteacher and staff. It is important that training is arranged for governors to enable them

to understand and realise the implications of their new role in the local management of schools. (Thomas, Kirkpatrick and Nicholson 1989 p23)

In two manuals sampled, advice is offered that schools should not wait for Authority training. In the Practical Guide to the LMS Initiative materials the importance of being proactive in training is stated :

Schools should not wait for the LEA to start training. It may be possible for schools to mount their own in-house training to meet the varying needs of governors and staff. At least they should seek to identify their own training needs to ensure that LEA organised training meets their needs. (LMS Initiative 1988 pl0-5)

It is not clear from the Practical Guide how guidance was to be turned into practice. It fails to explain how schools, other than perhaps Authority 'pilot schools', would be able to deliver in-house training for there is no indication where the necessary expertise would come. Nor does the Guide explain how schools, most of which were still trying to understand the management dynamic to be worked out between professional teachers and governors to establish an effective corporate team, should deliver a joint training programme.

Stinton and Gillham examine the role of governors and then, like the LMS Initiative, suggest that it may well be in-house training that will be the practical response to the need for training. Stinton and Gillham explain to the headteacher:

If you are fortunate, your Governors will get some training from the Local Authority or other training institutions which will help them to discharge their new responsibilities, but in all probability, the main source of ongoing training and guidance to governors may well be you. (Stinton and Gillham 1988 p20)

Stinton and Gillham's Guide is rather cautionary, suggesting that Authorities will provide the minimum governor training required and effectively leave the headteachers to shoulder the main training responsibilities. It does not explain on what evidence the authors base their comments, however.

While the rationale behind the training is of interest, it is the practical content of a training manual which is most important, this study focusing on financial management training. The Section will look next at the content and the range of practical exercises to assess how theory was going to be turned into practice. The author has used the material and, inevitably, subjectivity will enter the discussion, both in the selection of the illustrative contents, but also in their value as training material.

If it is accepted that Local Management significantly increases the need for a school to set its educational aims and objectives before resourcing them out of its budget share, training manuals might provide some experiences in these tasks, even if only as 'revision'. The LMS Initiative and Spinks present conceptual models of the cycle of 'The Management Process' in general terms. In contrast, Thomas, Kirkpatrick and Nicholson's manual covers the cycle implicitly through the discussion of the basic philosophy of locally managed schools and through the case studies from the Primary and Secondary sector which are presented in Part I: these are the 'awareness-raising' elements of the manual. Part II, "Preparing For Practice", presents a series of Units with several management tasks requiring an identification of school educational needs and how these

might be resourced. The inter-relationship between resourcing and education is explored and short-term decision-making and long-term strategic planning is considered: this is effectively the management cycle.

Having set aims and objectives, resourcing issues follow. The LMS Initiative Training Package, Level One, presents a one day training programme covering:

Introduction to LMS.

Local management in an Educational Setting.

Financial Aspects of the School Management Plan.

Roles, Responsibilities and Relationships.

Level Two, also a one day training programme, covers:

School Management Plan.

Information Systems.

Planning and Budgeting.

Investigating Variances.

Elements of a School Budget.

Selected Issues.

Budget Setting.

The Year's Results.

In the author's opinion, with the exception of "Selected Issues", the material is very superficial, effectively presenting a number of 'awareness-raising' scenarios which fail to reflect the reality and the complexity of school resource management. In using and quickly discarding most of the material, the author was conscious of the need to present challenging problems which created the feel for a 'real school'. This, the author believes, the LMS Initiative material failed to do.

The content of Spinks' Workshop Manual units covers:

A Model for School Self-management

Policy Writing

Priority Setting

Curriculum Planning

Evaluation and Review

Guidelines for Implementation

In contrast to the LMS Initiative Manual, Spinks takes Rosebery District High School as a school example and so the Manual focuses much more on the detailed management decisions that senior managers are faced with in identifying school needs and how these might be resourced. As an aid to financial management training the Manual presents a number of simple calculations which begin to illustrate the integration of education and resourcing within the constraints of a school budget, although the Manual is little more than an awareness-raising device.

The "Managing Finance in Schools" series (Gillham et al) is a series of workbooks. The Primary Headteacher's Guide raises awareness of fairly broad issues which will possibly have an impact on managing finance, for example employment legislation. However the workbook contains only a few exercises which will provide headteachers (and/or governors) with a positive training experience in managing finance. The exercises are based on broad estimates of figures which, unfortunately, are soon unrealistic in that they become out of date. The author has found that governors and headteachers want, ideally, exact current figures for their own schools to be used in management training.

Stinton and Gillham's Secondary Headteacher's and Head of Department's Guides are workbooks which raise awareness

about the details of a selection of management issues. For example, the Headteacher's Guide (p40) deals with "The problem of weighting the elements within the formula". This requires participants to have a thorough understanding of the Authority formula and the problems presented in satisfying the DES and Welsh Office rules for funding. While the school can do nothing about the Authority weightings in a given financial year, virement can alter the 'school weightings'. Thus the management issues in the training are far more about practical issues.

The Head of Department's Guide (p41) presents a few example practical management problems which the head of department should be aware of, for example, "The likely effects of inflation?" As a management training exercise this is a realistic problem to consider. In summary, however, the Secondary Headteacher's and Head of Department's workbooks contain only a few exercises and sample financial statements to which the managers could relate. As with the other manuals, their use as training material (i.e. extending management competence) is limited.

Knight's "Familiarisation and Initial Training Material" is an apt description of the content. It gives relevant advice about the nature of the management changes with a statement about the context of the new management responsibilities and echoes Levacic's perception of financial responsibility and skills outlined in Chapter One. Knight says:

If LFM is about management, it is no different in principle from management of the curriculum or the timetable, or the management of pastoral care. Broadly it requires similar generic management skills - planning, organising and coordinating,

managing people and resources, evaluating. Obviously it requires some specific skills and knowledge, but it is important to realise that these are not advanced or difficult. Advanced accountancy skills are not required. They are not in the same league of difficulty as the concepts and skills required in the management of learning. (Knight 1988 pA3).

Knight uses a few case studies and problem-solving exercises which realistically illustrate the concepts and application of Local Management. The content covers finance and the use of information technology, implications for people and considers opportunities and problems. By examining the current concerns at the time of publication of Knight's manual, and by relying on a considerable amount of pioneer Authority factual details and wider management information, the authenticity of the material enhances its worth as a training resource. It succeeds in familiarisation and generally succeeds in providing initial training.

Thus in summary, of the five manuals sampled, there is a general ambivalence or lack of comment over the need to train governors with headteachers and senior staff, and the need to train Officers and Advisers. There is clearly an opinion that in-house training will be necessary because of the logistics of training involved, but also in-house training may well be the most effective method of training.

The author finds Knight's manual is acceptable in preparing the ground for new management practices. And, if Spinks' management cycle model is used in conjunction with the manual of Thomas, Kirkpatrick and Nicholson, the principles of the Local Management framework are satisfactorily set out; from these the practical management training needs are

identified. Their manual then provides a range of appropriate training materials to match the training need, based on the practical experience of Local Management in Solihull. In the author's experience, if the manual is used by a trainer with appropriate knowledge, it can provide effective training experiences for managers entirely new to their increased responsibilities. With modifications to suit the Local Authority situation, the manual can be used with experienced 'pilot school' managers.

As this study has discovered in Cambridgeshire, Solihull and Norfolk, the process of establishing a training programme is often slow and is Authority-orientated, rather than 'globally-orientated' for the benefit of all Authorities. The reservations expressed about the sampled manuals acknowledge these difficulties. Section Six will summarise the research findings on training programmes.

SECTION SIX: TRAINING REQUIREMENTS OF GOVERNORS, HEADTEACHERS AND SENIOR STAFF.

Chapter One discussed the growing responsibilities of headteachers and governing bodies with the introduction of Local Management of Schools. Chapter Two has considered the preparation for training for increased responsibilities. At this stage it is appropriate to present a summary of the training requirements of the school management 'system' (Appendix 8) as perceived by the author from these discussions, and from his own awareness of training need gained from his professional responsibilities.

Table 1 presents the short-term training needs for the 1988 Education Reform Act, but subsumed under long-term requirements which are part of a more systematic, better quality training structure outlined in Section One. The needs of the individual governor, headteacher and senior staff member, and the needs of the corporate management team as part of the school 'system', are presented. Individual and corporate needs are part of a continuum and are not discrete training requirements. The needs of the school 'system' managers in responding to the environment are also presented.

TABLE 1: MANAGEMENT TRAINING NEEDS IN AREAS OF INCREASED RESPONSIBILITY.

Knowledge, Understanding and Attitudes to contribute to Enhanced Performance of:

MANAGEMENT TRAINING NEED (Categories NOT discrete)	SCHOOL SYSTEM			
	INDIVIDUAL S.S. Head	GROUP Gov	ENVIRON- MENT	
MANAGEMENT CYCLE				
Policy Planning (C2 S4)	✓		✓	
Management Plan Formulation (C1 S1)	✓		✓	
Corporate, Organisational (C2 S1)	✓		✓	
Strategic Management (C1 S1), (C2 S1)	✓		✓	
Operational Management (C1 S1)	✓	✓		
Objectives Setting (C1 S5)	✓	✓	✓	
Continuity of Management Cycle (C1 S5)	✓		✓	
Decision-making Cycle (C2 S1)	✓		✓	
PERSONNEL MANAGEMENT (GENERAL)				
Consultation (Education/Personal) (C1 S5)	✓		✓	
Negotiation (C1 S5)	✓		✓	
Development of Middle Management (C2 S1)	✓			
Handling Professional/Lay Tension (C2 S1)	✓			
Role Identification (C2 S1)	✓	✓	✓	
Relationships (C2 S5)	✓		✓	✓

Knowledge, Understanding and
Attitudes to contribute to
Enhanced Performance of:

MANAGEMENT TRAINING NEED
(Categories NOT discrete)

SCHOOL SYSTEM

INDIVIDUAL GROUP ENVIRON-
S.S. Head Gov MENT

"OUTPUT" MANAGEMENT

Public Accountability (C1 S1)		✓	✓	✓	✓
Conduct of School (C1 S1)	✓	✓		✓	
Common Sense View of School (C1 S5)	✓	✓	✓	✓	
Identify School Characteristics (C1 S5)	✓	✓	✓	✓	
Resourcing/Attainment Balance (C1 S5)		✓		✓	
Evaluation, Performance Indicators (C1 S5)	✓	✓		✓	✓
Responsiveness to Community (C2 S3)		✓		✓	✓
Understanding Management Implications (C2 S5)	✓		✓	✓	

MANAGEMENT of TEACHERS and CURRICULUM DELIVERY

National Curriculum Implementation (C1 S1), (C1 S5)	✓	✓	✓	
Setting Educational Priorities (C1 S1)		✓	✓	
Management of Teacher Time (C1 S4), (C1 S5)		✓		
Staff Appointments (C1 S4), (C1 S5)		✓	✓	
Staff Appraisal (C1 S5)	✓	✓		
Management of Learning Skills (C2 S5)	✓	✓		
Capitation Distribution (C1 S4)	✓	✓		

BUDGET and DATA MANAGEMENT

(Sub)Formula Funding (C1 S3)	✓	✓	✓	
Rolls and Budget Prediction (C1 S3)	✓	✓	✓	
Information Systems (C1 S5)	✓	✓		
Financial Procedures (C2 S2)	✓	✓		
Budgetary Information (C2 S2)	✓	✓		

Knowledge, Understanding and
Attitudes to contribute to
Enhanced Performance of:

MANAGEMENT TRAINING NEED
(Categories NOT discrete)

SCHOOL SYSTEM

INDIVIDUAL GROUP ENVIRON-
S.S. Head Gov MENT

"OTHER" MANAGEMENT

Competitive Tendering (C1 S2)	✓		✓	
Community Use of Schools (C1 S2)	✓		✓	✓
Laws and Regulations (C2 S1)	✓	✓	✓	
Monitoring External Bureaucracy (C2 S1)			✓	
Utilising Past Management Experience (C2 S2)	✓		✓	

KEY:

(Main References): C1 S2: Chapter 1 Section 2

S.S. : Senior Staff

The pattern of management training needs developed in Table 1 highlights a number of issues, including that of the importance of the headteacher. As Ball pointed out:

The model of organisation which the ERA implies is clear: it is that of governors as Board of Directors and headteacher as Chief Executive. Headteachers emerge as key figures in the ERA reforms. (Ball 1990 p67)

The main training issues highlighted by this analysis are:

- 1) The problems of providing for extensive individual needs (headteachers particularly) and headteachers-with-governors as part of the school management team.
- 2) The issues of training for middle management, though not a focus of this study, should be considered in support of the senior management.
- 3) The problem of training provision at all management levels: is the Authority able to provide it?

4) Should the Authority provide all the training, or should it have: "A vision of itself as a provider of services to institutions, which recognises the widest possible spectrum of provision, both local education authority and other."

(Audit Commission 1989 p8)

5) Is there a conflict of interests between the Authority as provider of management training and as monitor of institutional performance?

SECTION SEVEN: CONSENSUS, PRACTICE AND DATA COLLECTION.

Similarities (i.e. a 'consensus') have emerged from studying the four case study Authorities' approaches to training, from a careful review of the manuals and materials available, and from the supporting material from the DES or the Welsh Office.

Emerging from the case studies and literature survey, this research will concentrate on gathering and analysing data to assess:

- 1) The growing awareness of the need for more in-depth training to build on the short-term introductory module foundation.
- 2) Training in finance and budgeting to resource identified school educational objectives.
- 3) The training of governors, headteachers and senior staff for corporate strategic and operational management.
- 4) The methodology of delivering training.

Social science research requires the collection of data to substantiate or challenge the subjective interpretation of information and to assess whether theory equates with practice. Chapter Three will discuss the methods to be employed to gather statistical data on training from English and Welsh Authorities, and in particular on South Glamorgan's training programme. Data collection will cover all aspects of management training, but financial management training will continue to be of considerable interest.

CHAPTER THREE

RESEARCH METHODS TO COLLECT PRIMARY DATA ON THE PREPARATION, DELIVERY AND EFFECTIVENESS OF MANAGEMENT TRAINING.

PREFACE: The Chapter will consider the research methods chosen to attempt to extract relevant data on the management training in preparation for Local Management of Schools, covering the following themes:

Section One will briefly draw together the increased management responsibilities of governing bodies and the increased need for management training to establish the context for 'primary data' collection to effect a meaningful analysis of training.

Section Two will address the general strategies for collecting data and how the timing of the data collection fits into the overall framework of management training.

Section Three will consider the Questionnaire sent to all Authorities in England and Wales.

Section Four will consider the monitoring of South Glamorgan's introductory governor training scheme as a case study.

Section Five will discuss the methodology of using a group of volunteer governors presented with objective tests to identify their pre-training and post-training competencies and attributes.

Section Six will consider the taped interview approach to data collection.

Section Seven will briefly look at the ways that the collected data can be presented to draw the four strands of information together.

**SECTION ONE: INCREASED MANAGEMENT RESPONSIBILITIES AND
INCREASED MANAGEMENT TRAINING NEEDS: DATA COLLECTION TO
ANALYSE MANAGEMENT TRAINING.**

Chapter One established that the responsibilities of governors, headteachers and senior staff would increase considerably at several management levels. Chapter Two examined how management training should be a satisfactory way of preparing managers to take on more responsibility. Not only are managers likely to require different levels of management training, but quite clearly there is a range of topics that will need to be addressed at these different levels for short-term and long-term management responsibilities.

While Chapter Two touched on the process of the identification of the management training needs, no clear structure or methodology emerged. This study is focusing on management training and, ultimately, will make recommendations for improved long-term management training in the future. It is therefore important to ascertain more precisely how management training needs have been identified so far: if identification has been haphazard, then management training may be unsatisfactory as a result.

The questions to be answered on short-term training are:

- 1) What management training topics, including financial management training, have been identified; how, and by whom were they identified?
- 2) What decision was taken to deliver joint or separate training for governors, headteachers and senior staff; who made the decision?

- 3) Who will deliver training?
- 4) What materials will be made available?
- 5) What locational strategy for delivery has been planned?

For meaningful research to answer these questions and lead to a deeper understanding of the many training issues revealed, and to propose positive recommendations for future training, primary data is needed to examine the relevance of the responsibilities and training needs outlined, and tabulated at the end of Chapter Two.

Data collection can be carried out at a number of levels. At the Authority strategic planning level, data collection in the context of this research will provide a useful comparison of South Glamorgan with all other Authorities in England and Wales. The Authority overview of its general strategic plan for training will be compared with those of other Authorities. Within South Glamorgan as a chosen case study further data can be collected by monitoring training being delivered to groups of governors. At individual governor level it will be worth assessing their expectations of, and reactions to, the training programme and incorporating their views in the composite picture being constructed. Management training, and financial management training within that context, can thus be assessed from several levels or perspectives. When a summary is made and recommendations for future management training are put forward in Chapter Six of this study they will thus withstand any criticism that recommendations are based on inconclusive evidence or unsatisfactory research which has over-looked an important dimension or dynamic in the

management training equation.

The strategies to be adopted for specific categories of primary data collection will be discussed next.

SECTION TWO: DATA COLLECTION STRATEGIES AND TIMING.

This study is designed to compare and assess the relative management training programmes being developed by Authorities and will make recommendations for future development. Comparisons should be made only if the data to identify differences and similarities can be said to be reliable and valid. Data is 'reliable' if (providing the data was time-independent) the same results were obtained by the same tests applied a number of times. The data is 'valid' if it accurately measures that which it sets out to measure, but even then, as Bell warned:

Validity....tells us whether an item measures or describes what it is supposed to measure or describe. If an item is unreliable, then it must also lack validity, but a reliable item is not necessarily also valid. (Bell 1987 p51)

In this study therefore the terms 'reliable' and 'valid' will always be used in the context of Bell's warning. The problem faced in this study is the collection of data which is reliable and valid, and which research methodology should be employed to attempt to achieve this. Comparisons could be made by objective testing (a positivist approach). The researcher identifies normative paradigms and designs quantitative tests to discover general laws; the data collected is therefore quantitative. However 'training programmes' are not ideally suited to objective testing: what, precisely, could be tested quantitatively?

The social science researcher may tend towards the naturalistic approach, identifying interpretative paradigms which focus on the relativistic nature of the social world with emphasis on particular and individual behaviour. The

data collected is quantitative and qualitative.

The positivistic and naturalistic approaches are opposite 'ends' of the data collection methodology spectrum. Gray offered a warning that:

It is considerably more difficult to explain, predict, and control situations involving human beings, by far the most complex of all organisms. There are so many variables, known and unknown, operating in any educational environment that it is extremely difficult to generalize or replicate findings. (Gray 1987 p4)

Cohen and Manion advised a range of data collection methodologies to strengthen the researcher's confidence in the investigation, stating:

He needs to be confident that the data generated are not simply artifacts of one specific method of collection. And this confidence can only be achieved as far as normative research is concerned when different methods of data collection yield substantially the same results. Further, the more the methods contrast with each other, the greater the researcher's confidence. (Cohen and Manion 1989 p269)

Cohen and Manion advised that 'triangulation' is appropriate for data collection. It will achieve some of the advantages of positivistic and naturalistic approaches. (In this case the 'data' relates to information which facilitates the assessment of management training.) They explained:

By analogy, triangular techniques in the social sciences attempt to map out, or explain more fully, the richness and complexity of human behaviour by studying it from more than one standpoint and, in so doing, by making use of both quantitative and qualitative data. (Cohen and Manion 1989 p269)

The author's professional responsibilities in South Glamorgan helped formulate a research data collection strategy and method through an informal data 'exchange'. Discussions with Officers at Welsh Authority, South West

Authority and at national Authority meetings enabled the author to 'sample' a variety of training programmes and clarify the methodology for formal sampling. The data sources and methodology are introduced below.

A) Data Collection: a Questionnaire to all Authorities.

The chosen method of data collection from all Authorities was the postal Questionnaire. This would provide for an objective analysis of data received and, providing an acceptable response rate was achieved, the chance of statistical reliability of results. It was acknowledged that the summer vacation months of July and August 1989 would be difficult for communication. So too would the pressure of Authority Submissions having to be delivered to the DES or Welsh Office by the end of September 1989 make August and September a particularly busy time. Therefore the Questionnaire was sent out in early May 1989. The Authority training situation "as at the end of May 1989" was sought.

Before the Questionnaire was mailed a draft Questionnaire was piloted. As Bell pointed out:

All data gathering instruments should be piloted to test how long it takes recipients to complete them. Ideally it should be tried out on a group similar to the one that will form the population of your study. (Bell 1987 p65)

The draft Questionnaire was presented in April 1989 to the South Glamorgan governor training advisory panel, a group of twelve with professional and 'lay' educational interests. The panel's observations made during the pilot, and the modifications made before the final Questionnaire was mailed, will be commented on when the design and rationale are considered later.

During August and September a reminder letter was sent to all County Authorities that had not responded to the initial Questionnaire and its covering letter. Only County Authorities were contacted because of the costs already incurred in the first mailing and, South Glamorgan being a County Council, this was considered to be the most appropriate and cost-effective target population for a reminder. Moser and Kalton accepted that: "One can, for example, send the reminders to only a sub-sample of the initial non-respondents." (Moser and Kalton 1971 p267)

Unfortunately the reminder letter was delayed by vacations and industrial action which affected the Authority's postal services. It was sent to County Authorities in late September 1989. Therefore in the letter it was necessary to emphasise that the survey was, by then, 'retrospective', "as at the end of May 1989".

The problem of non-response is considered by some researchers to cast doubt on the validity of the collected data. Bell commented:

A non-response is a problem because of the likelihood - repeatedly confirmed in practice - that people who do not return questionnaires differ from those that do. (Bell 1987 p67)

Scott was even more cautious of a low response rate which, in his opinion, is anything in the region of a non-response rate of over 10%. Scott warned that a low response rate:

Could distort results, and so, if at all possible, some effort should be made to encourage more people to return completed questionnaires. (Scott, 1961 pp143-205)

In contrast to Bell's and Scott's serious criticisms of non-responses to questionnaires, Moser and Kalton detected a

positive benefit of a questionnaire to the research if the researcher has some knowledge of possible reasons for the non-response. They stated:

And even when a questionnaire may not achieve as high a response rate as interviewing, its merits may be strong enough to weigh the balance in its favour, particularly if an estimate can be made of the effect of the non-response. (Moser and Kalton 1977 p256)

The author noted the three written explanations of non-responses, two telephoned explanations and several verbal explanations at Authority meetings. These explanations indicated that many non-responding Authorities were planning similar training programmes to those of the responding Authorities. By comparing the pattern of responses of the first Questionnaire batch with the pattern of the second batch of Questionnaires, Bell's comments, on non-responses which indicated a different approach, will be discussed later in this study.

B) Data Collection: Group monitoring of governors in South Glamorgan.

Data collection came from approximately 140 governors and 20 headteachers and senior staff in the groups which were receiving the first phase of introductory management training modules during April and May 1989. After the delivery of the training modules the governors were requested to provide a statistical assessment of their training experience on a simple form covering their enjoyment, the amount of learning and the relevance of the management training.

C) Data Collection: Individual monitoring of volunteer governors in South Glamorgan.

Statistical data from objective testing was collected to examine a range of responses to training, both before and after the training course. Between the two phases of data collection a period of a few months was allowed so that the governors could assess how their training had subsequently related to their experience of governing.

D) Data Collection: In-depth interviewing of volunteer governors in South Glamorgan.

The method which relied most on a subjective analysis of the results, was the in-depth interview with volunteer governors. Once again they were interviewed before and after their training with a gap of a few months during which they could reflect on the effectiveness of training and subsequently relate the training to practical experience.

These four major approaches to data collection were designed to cover all aspects of training in terms of preparation, delivery and effectiveness. They would also provide for important cross-referencing and the identification of some of the more subtle aspects of training which could not be identified from one data source alone. The results should provide sufficient information for a purposeful evaluation of training. Once evaluated, recommendations for future training strategies could be made. A detailed discussion of data collection will be presented in the Sections following.

SECTION THREE: THE RESEARCH QUESTIONNAIRE TO ALL AUTHORITIES IN ENGLAND AND WALES.

Three objectives were set when designing the research Questionnaire to all Authorities in England and Wales (Appendix 9). The first objective was that the time taken to fill in the Questionnaire should be kept to a minimum while nevertheless gathering the maximum amount of information. As Evans pointed out:

The amount of writing subjects will have to do should be kept at a minimum. The rule should be: Get all the information you need and no more. (Evans 1984 pp47-48)

Anticipating the work pressures that the months leading up to Authority Submissions to the D.E.S. or Welsh Office would place on Officers likely to consider the Questionnaire, the author considered that it was imperative that the objective was met.

To meet this objective two strategies were adopted. Firstly, as Evans advised:

One useful device is a list of possible answers from which the most applicable has to be chosen, but if this is employed it is necessary to see that the list is as exhaustive as possible....No matter how careful the inquirer has been there may still be some subjects who wish to give answers not already included. To accommodate these a space should be left at the end where they can make their own additions. (Evans 1984 p48)

To ensure that an appropriate and exhaustive list of possible answers was presented, the Questionnaire was piloted with the South Glamorgan governor training advisory panel. Their observations and comments were incorporated in the final design of the Questionnaire, including spaces for additional responses.

The second strategy was to provide a box grid for responses so that, other than any written comments that the respondent might choose to make, all that was required was the time taken to select the relevant box and to place a tick in it. The box grid was designed, supported by advice from the governor training advisory panel, to facilitate computerised data base recording and analysis. It was the experience of researchers on the governor training advisory panel (in social science fields) that a limited range of boxes (i.e. "high, medium, low, nil") facilitates easy responses and subsequent analysis. Evans emphasised the importance of designing a simple questionnaire so that:

Finally, the form and lay-out of a questionnaire should be such that the replies can be analysed as easily as possible. Multiple choice answers are easier to analyse than open-ended responses.
(Evans 1984 p49)

Working through the Questionnaire the advisory panel indicated a likely response time of about twenty minutes. Moser and Kalton commented on the importance of limiting the length of the questionnaire:

The length of the questionnaire must be presumed to affect the morale of both interviewer and respondent, and probably also affect refusal rates and the quality of the data; these are unknown quantities unless special efforts are made in the pilot survey to estimate them. (Moser and Kalton 1971 p309)

The author believed that twenty minutes of Authority Officer time and thought did not seem an unreasonable request and the advisory panel concurred with this view. However a cursory glance over a Questionnaire does not necessarily provide a sufficient stimulus or give an adequate indication of the time likely to be needed in filling it in. To try to avoid the Questionnaire being filed in a pending tray

instead of being filled in, the introductory letter (Appendix 10) provided the twenty minute guideline.

The second objective of data collection was to elicit the required information for the comparative study. Although this was quite clearly critical to the purpose of the analysis and comparison of Authority training schemes, the objective would not have been met had the first objective failed; therefore it was the second or 'lower order' objective.

The Questionnaire was designed to follow a logical sequence of questions, the clarity of the sequence facilitating an easier, and therefore more willing, response from Authority Officers. Dean said: "Logic is needed to ensure a flow of questions that cuts out needless repetition and to fit in subsets of questions..." (Dean 1978 p15)

The logical sequence for the Questionnaire was first to discover the sources of identification of training needs within each Authority. Secondly, the Questionnaire sought to discover the content of the training needs modules themselves, and thirdly investigated the personnel and the material being used in delivering training. The locational strategy for training delivery, and the length of experience of training so far delivered in each Authority, comprised the final two subsets of questions. By repeating the general order of the pattern of responses offered in each subset of responses in the Questionnaire, though with variations in choice where appropriate, it was intended to help direct the respondent, yet was not "needless repetition".

The page lay-out of the Questionnaire attempted to keep 'categories' of information separate, while not making the Questionnaire too bulky. The governor training advisory panel observed that the balance presented was almost too lengthy, but the divisions between subsets of 'questions' (or alternative responses) was at least clear. The panel appreciated that any reduction in the length of the Questionnaire would lose possibly useful data and, on balance, accepted the length of the document.

The third objective for data collection was to encourage a good response by giving Authority Officers responding as much 'ownership' of the Questionnaire as possible. This was done by explaining the status of the researcher in the covering letter; they were thus being asked to help a 'fellow Authority Officer'.

This approach satisfied Moser and Kalton's observation that:

A covering letter needs to be sent out with the questionnaire to take the place of the interview opening, and as such it must try to overcome any prejudice the respondent may have against surveys. It should make clear why and by whom the survey is being undertaken, how the addressee has come to be selected for questioning, and why he should take the trouble - for such it is - to reply. The last point is crucial. (Moser and Kalton 1971 p264)

The author hoped that the stamped, addressed envelope enclosed for the reply (27p) would encourage a high response rate. Moser and Kalton had observed that this was an important consideration, noting that:

The respondent may feel that the stamp represents money which he cannot easily throw away, yet it would be dishonest for him to steam it off and anyway it would not be worth the trouble; his way out of the quandary is to complete the questionnaire and send it back. (Moser and Kalton 1971 p265)

Reinforcement of ownership came from respondents being invited to add their own response categories, to make comments at the end of the Questionnaire, and to request the results of the survey. The intention was for them to feel that they had helped construct parts of the Questionnaire and had included their own particular perspective to their interpretation and comment. The summary of Authority responses themselves, if requested, would allow them to receive feedback on their contribution, and to realise that many other Officers had similarly helped to build a composite picture of management training.

SECTION FOUR: INTRODUCTORY MANAGEMENT TRAINING MODULES IN SOUTH GLAMORGAN: GROUP MONITORING.

South Glamorgan provided an introductory governor training programme covering: "governing body meetings", "roles and legal responsibilities", "finance and budgets", "staff selection", and the "National Curriculum".

To assess the effectiveness of South Glamorgan management training, and thus in turn to be able to assess the overall Authority strategy and emphasis in the wider context of other Authority training schemes, governors who attended the introductory training modules during April and May 1989 were asked to assess their training experience. Approximately 200 governors were trained, of which recorded assessments were received from 160. The groups unfortunately included very few headteachers or senior staff (20 out of 160), places on courses being allocated on a 'first-come-first-served' basis by County Hall staff who did not know the professional or lay status of those applying for places. (The volunteer governor group for in-depth analysis was an exception to this and did receive preferential treatment during allocation.)

It is useful at this point to examine briefly the purpose of using a case study approach in the research. There are a number of advantages to be gained by this method, three of the main ones being summarised by Cohen and Manion when they pointed out that case studies:

1. Are 'strong in reality' but difficult to organise... This strength in reality is because case studies are down-to-earth and attention holding....

2. Their peculiar strength lies in their attention to the subtlety and complexity of the case in its own right.

3....represent something of the discrepancies or conflicts between the viewpoints held by participants. The best studies are capable of offering some support to alternative interpretations. (Cohen and Manion 1989 p150)

If the Questionnaire responses revealed that South Glamorgan is a 'typical' Authority, then case study group monitoring material may enhance the relevance of recommendations for future management training for all Authorities. If South Glamorgan is 'unique' however, case study findings may have limited value.

The assessment forms distributed to the governors by the Authority were designed jointly by the tutors themselves, with additional help from the governor training co-ordinator and the author. This approach thus gave the tutors 'part-ownership' of their course assessment and feedback. The three areas in which the tutors were interested were 'enjoyment', 'learning' and 'relevance to governors'. It was considered important that adult learning should be enjoyable, not only as a general principle of any learning strategy, but also because it was for most governors an additional commitment at the end of a working day, more likely undertaken if enjoyable.

Tutors wished to discover how much 'learning' had gone on during training, and how relevant the training experience had been to the participants. Clearly adults might learn something, and enjoy it in so doing, but ultimately the relevance of what is learnt is the critical factor if training is seen to be 'effective'.

Assessment in the three areas was based on a "1" minimum to "8" maximum scale. Governors were encouraged to complete assessment forms at the end of the training session, but approximately 15% returned forms a week later. It was not practical to compare immediate with delayed assessment scores and so responses are presented in Chapter Four without differentiation.

South Glamorgan's Governor Training Co-ordinator had the responsibility of analysing the returned forms, results being passed to the author for research purposes. All those responsible for planning and delivering management training in the Authority looked to the feedback to indicate how training might be developed in the future, as had been explained to governors. Harrison observed the extent to which content and methodology might change as a result of feedback, noting:

For instance, as a result of such feedback (questionnaires in this case), Northamptonshire has recently cut down on the use of nationally produced videos and has made its courses much more participative. (Harrison 1990 pA26)

Statistical assessment, though a valuable source of feedback, could never give a complete picture of the success, or otherwise, of a management training programme. Section Five will consider a more in-depth monitoring of a small volunteer governor group in South Glamorgan. This approach was designed to gather statistical data which might help to reveal the more complex inter-relationships between knowledge, confidence and attitude that management training might establish.

SECTION FIVE: OBJECTIVE MONITORING OF A VOLUNTEER GOVERNOR GROUP IN SOUTH GLAMORGAN.

At the end of public meetings held to outline South Glamorgan's Local Management proposals, twenty governors volunteered to provide 'in-depth' information and feedback about their management training. A random sample from all of South Glamorgan's 2,000 governors would have been preferred for research purposes, but those volunteering (rather than being sampled) came from the 1,000 governors attending the meetings.

Discussing the possible limitations of small scale research, Bell pointed out:

All researchers are dependent on the good will and availability of subjects, and it is likely to be difficult for an individual researcher working on a small scale project to achieve a true random sample. If that proves to be the case, you may be forced to interview anyone from the total population who is available and willing at the time. Opportunity samples of this kind are generally acceptable as long as the make-up of the sample is clearly stated and the limitations of such data are realised. (Bell 1987 p73)

The composition of the volunteer group (ultimately thirteen found time to participate in the research) will be described in Chapter Four. Each volunteer provided statistical information as well as observations and opinions in the interview, as will be outlined.

In an attempt to assess the situation of governors before and after their training, an objective test was designed to provide supporting statistical data which would complement the information gained during their in-depth interviews. The test was 'objective' in that the author gathered data in the same way from each governor, he had no direct control over

the way that the governors responded, and a subjective interpretation of results was not the prime purpose of the exercise.

Although these were, as far as possible, 'objective' tests, the author was aware that the subjects of research may respond in a more positive, enthusiastic manner to questions and stimuli just because they are being researched. As Handy pointed out:

It could be the sense of being the focus of managerial and research attention, (that) may generate much of the improvement in morale and output (the Hawthorn effect). (Handy 1985 p330)

The possibility, therefore, that the results obtained from the volunteer governors might not be the same as those obtained outside the 'research' context has to be remembered. This is one of the limitations that Bell was concerned should be clearly stated.

Three areas or management attributes for assessment were identified for governors: their knowledge, their confidence in being able to use their knowledge in carrying out their responsibilities, and their attitudes to a number of potentially more sensitive issues with which they might be faced.

The format of the objective testing was carefully prepared and explained to governors so that they knew that the same test would be administered later. Particularly where attitude testing is attempted this is considered important by Weisberg and Bowen who observed:

In deciding whether attitudes have changed between two successive surveys, it is important to be sure that the same exact question was asked in both surveys. (Weisberg and Bowen 1977 p87)

Therefore, before the objective tests were administered the purpose and methodology was explained to each governor, reminding them that the Authority and the author were interested in their results. Having completed the explanation, each was asked to agree to the approach suggested. It was emphasised that the information they provided would be coded so that only the author could identify anyone, whether for the Authority or for research purposes. This was important, for Dean observed:

In other cases it (confidentiality) may encourage people to co-operate if they know their replies will not be personally identified, particularly when the survey is for the local authority. (Dean 1978 p10)

For the ten 'middle class' governors it became apparent from their comments that some of them had participated in, or had carried out, some sort of research themselves. This open approach to the monitoring process helped to gain their intellectual commitment to it. For the three 'working class' governors the explanations helped to reduce any tension and enhanced their feeling of importance in contributing to research. For all governors the explanation of the objective testing encouraged communication and reduced the tension which the taped interviews, which immediately followed the testing, might have engendered.

It was important to control strictly the objective tests for the governors, presenting a 'standard test' to each of them to enhance the reliability and hopefully the validity of the data. Comparisons between governors could only be made if a

standard test had been administered. To provide a standard test each governor was required to give an immediate reaction to a stimulus, rather than a measured response. The measured response would have given participants the chance to consider all the ramifications of a situation which might have included more subjective influences. To effect this immediate response, the stimulus was a statement read to the governors, allowing only ten seconds for recording their reaction to it before the next statement was read out. The clock which was used was clearly visible to governor and author so that both were constrained and could judge the pace of the proceedings.

To assess 'knowledge' forty statements were read out. Before the first statement was read out it was important to set a scenario in which the governors felt at ease and in which each would respond in his or her own manner. To do this it was suggested to the participants that they were talking to a new governor very much like themselves i.e. the governor with whom they would feel a natural affinity and would therefore feel fairly relaxed with. Thus, for example, the parent governor was talking to another parent governor, the County Councillor was talking to another County Councillor.

The scenario presented was that the new governor had said to the volunteer governor being monitored: "Tell me about..". The affinity that the volunteer governor felt with the inquiring governor in this scenario was important, for the author was aware that some governors felt intimidated by those apparently possessing considerable knowledge and experience of committee work. Others, well experienced and

knowledgeable, felt frustrated by the naivety of some new governors, or felt overwhelmed by 'Authority figures' on the governing body.

It was hoped that the "Tell me about.." approach would allow experienced and inexperienced governors to respond to a new governor with whom they felt some affinity at their own perceived 'level'. They assessed and recorded the strength of their response on a scale of 0 to 4. This scale had been tested by the author in another educational research setting and had been acceptable to the respondents. A response of "0" indicated that they could say nothing about, and "4" indicated that they would be able to make comments about the specific issue raised in the statement. In each case it was suggested that a score of "4" would indicate that they would be able to provide information relevant to their school for about one minute (or more) including, if necessary, the negative information that the school, "Did not have..". This was only guidance, for some responses could provide information in less than a minute, so the governors would have to consider whether they could provide additional information beyond the superficial level of the question and response in order that a "4" was recorded.

A 'practice' statement was given before the forty statements were read out so that each governor was given a 'benchmark' for his or her own responses. If the results provided limited chances for comparisons between governors, the 'benchmark' for an individual governor would allow comparisons before and after management training. The practice statement was: "Tell me about..".

"The service buses which pupils use at the beginning and the end of the school day."

This 'benchmark' statement was repeated after the tenth, twentieth and thirtieth statement.

To assess 'knowledge' forty statements were read out at ten second intervals. The statements are presented in Appendix 11A.

To assess 'confidence' governors were asked to record reactions on a five point scale of -2, -1, 0, +1, +2 to a series of 10 timed statements, again allowing 10 seconds to respond. The statements are presented in Appendix 11B.

To assess 'attitudes' the same five point scale (i.e. -2 to +2) was adopted in responding to 10 timed statements. The statements are presented in Appendix 11C.

The expectation of any management training course was that it would enhance knowledge and confidence and would change attitudes. The scoring system for knowledge after management training should therefore show a higher score; the scoring for confidence should show a move from negative towards positive (or positive to more positive); the scoring for attitude should show a change, or a number of changes, without significance being placed on the direction of change.

The results of these objective tests are presented in Chapter Four. They help to provide additional information about the governors who were interviewed, with the possibility of cross-referencing any verbal comments which

echoed (or contradicted) statistical trends revealed by the responses. Section Six outlines the interview format.

SECTION SIX: TAPE RECORDED INTERVIEWS WITH VOLUNTEER GOVERNOR GROUP.

The author had already analysed the results of the governor group assessment of the introductory management training modules outlined in Section Four of this Chapter, although the individual assessments of the volunteer governors had not been identified as assessment forms did not require governors' names. Following this, the volunteer governors were interviewed immediately after the objective monitoring described in Section Five. Discussing the focused interview which the governors participated in, Cohen and Manion noted:

The actual interview is focused on the subjective experiences of the persons who have been exposed to the situation. Their responses enable the researcher (a) to test the validity of his hypotheses; and (b) to ascertain anticipated responses to the situation, thus giving rise to further hypotheses. From this it can be seen that the distinctive feature of the focused interview is the prior analysis by the researcher of the situation in which the subjects have been involved. (Cohen and Manion 1989 p326)

Each of the thirteen volunteer governors was interviewed and tape recorded before and after training. Bell stated that:

Tape recordings can be useful to check the wording of any statement you might wish to quote and to check that your notes are accurate, but nothing more. (Bell 1987 p75)

While Bell seems to indicate the limited importance of tape recordings, therefore, the author hoped that tape recordings would help detect the nuances and inflections in speech which reveal attitudes which the objective testing would not discover directly, and attitudes which might not be apparent from 'notes'.

Moser and Kalton advised that in interview situations it is important for interviewees to comprehend the situation in

which they are placed. They noted it is important for:

Cognition, or understanding by the respondent of what is required of him. It is part of the interviewer's job to teach the respondent his role. (Moser and Kalton 1971 p271)

Therefore, before each interview the governor was informed that his or her opinions and comments were welcomed, without reservation. It was explained that it was only by being faced with honest comment by governors that the Authority (or the author through research recommendations) could improve upon the management training strategy. It was also explained that once the transcript of each interview had been prepared, only the material which seemed particularly relevant to the study would be used, and that would require the expressed agreement of each governor.

Interviews were conducted 'at a convenient venue' for the participant. One interview was completed at the interviewee's home, five were at County Hall, seven took place in the school which the governor served.

Tape recording can cause tension which reduces the potential value of an interview and so to reduce this possibility each interview was preceded by an explanation of the areas of training that the interview would cover so that participants had time to consider their thoughts on those issues. This was in accord with Bell's advice to:

Prepare topics and then questions on cards or on separate pieces of paper, so that you can decide the order of questioning when all topics have been covered. The advantage of a focused interview is that the framework is established beforehand and so analysis is greatly simplified. (Bell 1987 pp71 - 73)

The interviewees were told that the pre-management training

interviews covered the anticipated timing and venue of the training, the desirable experience or 'qualifications' of the tutors and the style of delivery. However, most of the time was devoted to the anticipated details of the five management training modules that were going to be delivered.

After this framework of topics had been covered the interviewees were informed that there would be time for a more general discussion should they wish to make general or specific comments about areas not covered. This followed Moser and Kalton's observation:

Where the survey subject is highly complex or emotional, it may be that the greater flexibility of the informal approach succeeds better than set questions in getting to the heart of the respondent's opinion. (Moser and Kalton 1971 p297)

The author attempted to effect the right balance between structured questions and informal comment.

The post-management training interviews used the same format so that less time was needed to set the participants at ease. At the end of the 'formal' structure there was once again time for the governors to make more general comments, should they so wish, and each governor was asked to indicate the areas of more in-depth management training that he or she thought necessary or desirable at a future date. The 'results' of the interviews are presented in Chapter Five as part of the general analysis and interpretation of data. An interview transcript is presented in Appendix 24.

SECTION SEVEN: DATA COLLECTION RESULTS AND DRAWING TOGETHER DATA MATERIAL FROM DIFFERENT SOURCES.

The data collection will provide a number of 'sets' of statistical, quantitative and qualitative information:

A) The Questionnaire responses. The 'global' results will be presented, and then the 'in-depth' database search for more complex relationships which add to the understanding of the needs of management training. The Questionnaire is the largest statistical source of this research, and it will be compared with an NFER Authority survey of a similar size. South Glamorgan's Questionnaire responses will be presented. Quantitative results can be used to test reliability and possibly enhance validity.

B) The group monitoring responses in South Glamorgan. This is a quantitative data collection, but begins to research the more qualitative aspects of the training delivered.

C) The in-depth objective testing of volunteer governors. This is quantitative data which also reveals qualitative aspects of the training delivered.

D) Interviews with volunteer governors. This is qualitative data which may well illustrate some of the themes which have emerged from the quantitative analysis.

Chapter Four will thus present all the quantitative and qualitative 'evidence' on which the assessment and discussion of the state of school management training in England and Wales can be made in Chapter Five and recommendations for future management training can be made in Chapter Six. Quantitative evidence is 'factual'; qualitative evidence is subjectively corroborative. The

attempt being made in this research is to use a combination of the strengths of the positivist and naturalist approaches to build up a composite picture to support the logic of recommendations that will be made.

CHAPTER FOUR

THE RESULTS OF DATA COLLECTION.

PREFACE: The Chapter presents data which is divided into a number of Sections, some of these sub-divided into Parts. In all of Sections One to Five there will be an emphasis on a straight forward presentation of results. Interpretation and discussion of emerging 'themes' will be the content of Chapter Five.

Section One, Part A will present the results of the Authority responses to the postal research Questionnaire.

Section One, Part B will look at the 'global' results of the sixty one Authorities.

Section One, Part C will consider the more complex response patterns and trends which may emerge from a more specific 'in-depth' search of the database.

Section Two will consider the results and thus test the reliability of the Authority responses to the Questionnaire compared with the results obtained from an NFER survey of Authorities.

Section Three will present the results of the South Glamorgan response to the Questionnaire, as a case study.

Section Four will present the results of South Glamorgan introductory governor management training group monitoring.

Section Five will present the results of the objective monitoring of volunteer South Glamorgan governors.

Section Six will briefly mention the collection of 'data' as taped interview responses of South Glamorgan volunteer governors.

Section Seven will summarise the data collected and outline its use in the discussion in Chapter Five.

SECTION ONE. PART A. A COMPARISON OF THE QUESTIONNAIRE RESPONSES OF THE FIRST BATCH OF 54 AND THE SECOND BATCH OF 7 AUTHORITIES.

Appendix 12 presents the Questionnaire responses of the first batch of fifty-four Authorities expressed as raw figures, and these figures expressed as percentages of the fifty-four. Appendix 13 presents the Questionnaire responses of the second batch of seven Authorities expressed as raw figures. It is not of any statistical value to convert seven responses into percentages.

To compare the two batches, the simplest method is to count the number of boxes where the maximum number recorded in each batch corresponds. For example, "Questionnaire to Headteachers" has a maximum 34 in "Nil" from fifty-four Authorities, and corresponds with a maximum 4 in "Nil" from seven Authorities. The results of this method of comparison are shown in Table 2.

"Verbal requests from Governors" has a maximum 26 in "Medium" from fifty-four Authorities but there are two equal maxima of 3 in the "High" and "Medium" from seven Authorities. The result is recorded separately in the right-hand column (i.e. corresponding "equal maxima").

In one instance ("Questionnaire to Governors") both batches have shared maxima (a maximum 18 in "High" and "Nil" from fifty-four Authorities and a maximum 3 in "High" and "Nil" from seven Authorities. This is considered as a "Corresponding Maxima".

TABLE 2.

THE RESULTS OF THE BATCH OF 54 AND BATCH OF 7 AUTHORITY MAXIMA RESPONSES.

Questionnaire Text (Questionnaire Choices)	Number of Box Responses	54 Batch Responses & 7 Batch Maxima Correspond	54 Batch Responses & 7 Batch Maxima Correspond ("equal maxima")	Percentage of Maxima Corresponding
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(One in four chance of maxima corresponding)

Identification of Training Needs Source	22	12	4	73%
Identified Training Needs	19	10	2	63%
Identified Training Needs Preferred Method	19	5	6	58%
Method of Training Delivery (Personnel)	11	9	2	100%
Method of Training Delivery (Materials)	15	13	0	87%

Other comparisons:

	Chance of Maxima Corresponding	Maxima Correspond
Phase of training	1 in 5	Yes
Years of training	1 in 7	No
Geographical delivery	1 in 10	No

The analysis, while based on a simple comparative methodology, shows a similar pattern of responses between the two batches of Authority responses to the Questionnaire. This supports the author's contention that the seven Authorities replying after a reminder letter were

designing and implementing management training programmes very similar to the batch of fifty-four Authorities. The author is also confident that his professional, though informal, contacts with Officers from some of the forty or so 'no response' cohort of Authorities place him in a position to judge that most Authorities in England and Wales were developing similar management training programmes. If this hypothesis is acceptable from the evidence presented, the total of sixty-one Authority responses can be analysed together in Part B and later can be usefully compared with the results of an NFER Authority survey as a means of assessing the research Questionnaire's overall reliability.

SECTION ONE. PART B. THE 'GLOBAL' RESULTS OF THE 61 AUTHORITY RESPONSES TO THE QUESTIONNAIRE.

[Percentages expressed will refer to 61 Authorities, unless stated otherwise.]

Of the sixty one Questionnaires received, thirty two were from County Authorities (i.e. 32 out of a possible 46: 70% returned [South Glamorgan is excluded from the returns here]). Sixteen were from Metropolitan District Councils (i.e. 16 out of a possible 36: 44% returned). Thirteen were from Outer London Boroughs (i.e. 13 out of a possible 20: 65% returned).

The results of the sixty-one Authorities are shown in Appendix 14 as raw figures and as percentages. These results will form the basis of Section One, Part B, where the 'themes' which began to emerge in Chapters One and Two are examined in more detail.

Taking "High" and "Low" significance as worthy of comment, the 'global results' show that Authorities had given higher significance to a greater variety of methods in identifying the management training needs of governors, new to the management equation, than they had to identifying headteacher and senior staff management training needs. The most significant contributors to identifying needs were the LEA Officers responsible for training.

Universities or Polytechnics, Higher Education Colleges and Adult Education Institutions, the Trade Unions, Commerce and Industry, and questionnaires to headteachers were generally of "Low" or "Nil" significance in identifying training needs.

Six main areas of identified training needs clearly emerged from the Authorities responding to the survey. These were the 1986 and 1988 Act Details, the National Curriculum, Finance and Budgeting, Legal Responsibilities, Interviewing and Staff Selection and the Roles of Governors. Governing Body Procedures and General Management Skills were considered to be of high significance in approximately one third of the Authorities.

There are no "Nil" responses recorded in the six main categories. In four areas of training need, Grounds Maintenance, Multi-Ethnic Education, Interaction with Other Governing Bodies and Interaction with Commerce and Industry, in each case between twelve and eighteen Authorities categorised the training need as "Nil".

The Questionnaire responses can be usefully compared with

the management training needs presented in Chapter Two, Table 1. The Questionnaire has to present separate training 'boxes', several of which can be identified in Table 1. However the range of management skills suggested in the Table, and the complexity of the individual-group-environment matrix, implies a dynamic inter-relationship which the structure of the Questionnaire tends to mask. This inter-relationship will be referred to in Chapter Six recommendations.

The preferred method of delivery pattern that emerged from the 'global results' is very inconclusive (Questionnaire Pages 5 and 6). There were responses to each of the five choices offered (i.e. A to E) with no zero totals recorded. The minimum recorded was of one Authority planning to train "Governors by themselves; headteachers and senior staff together" (column D) for "Interaction with Other Governing Bodies". This management training need also recorded the maximum of thirty-seven Authorities which had "No preferred method" (column E).

Only "Roles of Governors" indicated a marginally clearer preference for delivery (Column A) than other response totals. No Authority recorded a marked difference in its strategy for the delivery of management training to primary or secondary or sixth form college governors, headteachers and senior staff.

By combining preferred methods A and C in the 'global results' (i.e. governors and school staff are trained separately) and B and D (i.e. governors and school staff are

trained jointly) a preference pattern emerges. (Appendix 15)
In sixteen out of the nineteen identified management training needs areas offered in the Questionnaire the general preferred method of delivery (where preferences were expressed) was for separate training. For example the National Curriculum is perceived as a training area where governors and teaching staff might be trained separately (thirty-four Authorities separately, sixteen Authorities together). Of the other priority training needs, 1986, 1988 Act Details, Staff Selection and the Roles of Governors are also perceived as requiring separate training. In contrast, Finance and Budgeting is more commonly perceived as being delivered as a joint management training approach (twenty-two Authorities separate, twenty-eight Authorities together).

While not priority training areas, Multi-ethnic Education and Gifted and Special Needs Provision, both 'curricular', are perceived as requiring separate training. Health and Sex Education, where governing bodies are required to make a statement of policy, are perceived as requiring joint training.

LEA Officers responsible for training have had high significance in delivery, supported by Advisers. Authorities have not widely used Commerce or Professions training staff, Education Consultants or Higher Education staff.

The materials predominantly used in delivering training (Questionnaire Page 8) have been produced by LEA Staff, with the LMS Initiative Training Package also of relatively high

significance. Two thirds of the responding Authorities had not used the materials produced by University or Polytechnic staff, Higher Education staff, Adult Education staff, Community tutors, Commerce or Professions training staff, Education Consultants and Independent Radio or TV material.

Authorities had no clear geographical strategy of training delivery (Questionnaire Page 9). Additional comments, invited on the last page of the Questionnaire, expressed difficulties in choosing the "Main Strategy"; a number of Authorities had chosen a mixture of approaches determined by the content of the management training and the phase of training that they were undertaking. For example, an Authority was delivering introductory National Curriculum training to individual Governing Bodies/School Staff, but was delivering second phase Finance and Budgeting management training in clustered Governing Bodies.

More than two thirds of the responding Authorities (Questionnaire Page 10) had been preparing and delivering training for less than a year and a half, but in that time had generally delivered the introductory phase of training and some were planning the secondary phase.

Less than ten Authorities added information on management training in the spaces provided after each subset of responses but there was no common theme which could be usefully added to the presentation of data. However three Authorities commented that they had used training materials developed by Somerset to support their own training

materials, and another two Authorities commented that they had used training materials developed by Kent.

The database may hold interesting variations between different Authority 'categories' i.e. County, Metropolitan District or Outer London Borough. However when comparing the separate responses of County, Metropolitan District and Outer London Borough Authorities the results must be treated with caution. Statistically the responses from the Metropolitan Districts (i.e. sixteen responses) and from the Outer London Boroughs (i.e. thirteen responses), if treated separately, are not significant. By combining the two sets of results (i.e. Metropolitan District and Outer London Boroughs, totalling twenty-nine: an 'urban' response) these can be compared with the County responses (i.e. thirty-two: an 'urban and rural' response). Where it would seem to be of value in the following analysis and interpretation of 'global' results this approach will be adopted, but interpretation of results will be no more than tentative.

There is no significant difference between the County and the Metropolitan District and Outer London Borough Authorities in assessing the management training needs of governors and headteachers, as shown in Table 3.

There is slightly less significance in the written requests from governors in Metropolitan Districts and Outer London Boroughs in the "High" category, but combining the "High" and "Medium" responses reveals a remarkably consistent pattern. This consistency is repeated in the analysis of the verbal requests from headteachers.

TABLE 3.**SIGNIFICANCE PATTERN OF MANAGEMENT TRAINING NEEDS IN AUTHORITIES.**

		SIGNIFICANCE:			
		HIGH	MEDIUM	LOW	NIL
County (32):					
GOVERNORS:					
Questionnaire	10 (31%)	7 (22%)	4 (12%)	11 (34%)	
Written requests	12 (37%)	8 (25%)	9 (28%)	3 (9%)	
Verbal requests	11 (34%)	14 (44%)	4 (12%)	3 (9%)	
HEADTEACHERS:					
Verbal requests	8 (25%)	13 (41%)	5 (16%)	6 (19%)	
Metropolitan Districts and Outer London Boroughs (29):					
GOVERNORS:					
Questionnaire	11 (38%)	4 (14%)	4 (14%)	10 (34%)	
Written requests	7 (24%)	11 (38%)	5 (17%)	6 (21%)	
Verbal requests	10 (34%)	15 (52%)	4 (14%)	0 (0%)	
HEADTEACHERS:					
Verbal requests	9 (31%)	10 (34%)	5 (17%)	5 (17%)	

The analysis of the significance of LEA Officers responsible for management training in the identification of management training needs may indicate a limited impact of geographical distance. In identifying training needs these Officers have moved around the schools as part of their daily tasks and may have thereby compensated for what might have been perceived to be the isolation of some of the more rural schools. The following significance pattern emerged:

TABLE 4.

A COMPARISON OF AUTHORITY SIGNIFICANCE OF OFFICERS IN IDENTIFYING MANAGEMENT TRAINING NEEDS.

	SIGNIFICANCE:			
	HIGH	MEDIUM	LOW	NIL
County (32):				
LEA Officers responsible for training:				
	21 (66%)	9 (28%)	0 (0%)	2 (6%)
Metropolitan District and Outer London Borough (29):				
LEA Officers responsible for training:				
	16 (55%)	9 (31%)	2 (7%)	2 (7%)

County LEAs give slightly more significance to the Officers responsible for training. This may reflect their mobility and, therefore, their role in reducing the geographical isolation of some of the country schools. However, as no clear pattern in the method of management training delivery based on geographical strategies has been identified (Questionnaire Page 9), the problem of whether the identification of training needs and delivery is influenced by distance can not be satisfactorily resolved from the responses received.

In urban/urban and rural Authorities, in the six main areas of management training needs identified (Questionnaire Pages 3 and 4), responses show a comparable assessment of "High" priorities. Table 5 shows that the Metropolitan Districts and Outer London Boroughs responses are marginally lower than the County Authorities in five out of the six training areas, though not significantly so.

TABLE 5.

A COMPARISON OF AUTHORITY HIGH PRIORITY MANAGEMENT TRAINING NEEDS

	HIGH PRIORITY	
	County (32):	Metropolitan Districts, Outer London Boroughs (29):
1986 & 1988 Act Details	27 (84%)	24 (83%)
National Curriculum	26 (81%)	22 (76%)
Finance and Budgeting	28 (87%)	23 (79%)
Legal Responsibilities	23 (72%)	21 (72%)
Staff Selection	25 (78%)	22 (76%)
Role of Governors	23 (72%)	20 (69%)

The Authority responses to the preferred method of training delivery (Appendix 14) did not reveal a sufficiently clear pattern to suggest that detailed comparisons between the urban and urban/rural Authority categories would be worthwhile. Within the statistical constraints already discussed, above, the results would not be reliable or valid. It is only when response columns A and C (i.e. 'separate' training delivery) and B and D (i.e. 'joint' training delivery) are combined that a possible pattern emerges, as shown in Appendix 15. The same approach can be applied to compare the urban/rural County and the urban Metropolitan District and Outer London Borough Authority approaches to delivery. Interesting differences in the six major training areas emerge: Table 6.

TABLE 6.**A COMPARISON OF AUTHORITY PERCEPTIONS OF SEPARATE OR JOINT MANAGEMENT TRAINING DELIVERY.**

COUNTY AUTHORITIES (32)			
IDENTIFIED TRAINING NEED	TRAINING SEPARATE	TRAINING JOINT	NO PREFERRED METHOD
1986,1988 Act Details	41%	44%	16%
National Curriculum	47%	41%	12%
Finance and Budgeting	37%	53%	9%
Legal Responsibilities	41%	47%	12%
Staff Selection	44%	44%	12%
Roles of Governors	47%	41%	12%

METROPOLITAN DISTRICT and OUTER LONDON BOROUGHs (29)

IDENTIFIED TRAINING NEED	TRAINING SEPARATE	TRAINING JOINT	NO PREFERRED METHOD
1986,1988 Act Details	59%	21%	21%
National Curriculum	66%	10%	24%
Finance and Budgeting	34%	38%	28%
Legal Responsibilities	41%	31%	28%
Staff Selection	48%	28%	24%
Roles of Governors	52%	21%	28%

The urban/rural County Authorities in each of the six management training needs areas have a more positive training strategy. The urban Metropolitan District and Outer London Boroughs consistently record a higher "No preferred method" percentage which indicates a less clearly defined strategy. For 1986, 1988 Act Details and the National Curriculum they have a greater preference for separate training.

Page 7 of the Questionnaire reveals that in delivering management training the LEA Officers responsible have "High" significance. This is marginally more apparent in the County Authorities (66% "High", 25% "Medium") than in the Metropolitan District and Outer London Borough Authorities

(69% "High", 14% "Medium").

Advisers were of "High" significance in twenty-five Authorities (i.e. 41% of those responding). Only nine County Authorities (i.e. 28%) considered advisers of "High" significance in delivery. In contrast sixteen (i.e. 55%) of the Metropolitan Districts and Outer London Borough Authorities considered Advisers of "High" significance. The choice of management training delivery appeared to be largely between Officers and Advisers, therefore, with County Authorities relying more heavily on the Officers.

Authorities recorded "Not yet used" for Higher Education Staff (forty-four out of sixty-one i.e. 72%), Commerce and Professions training staff (fifty i.e. 82%) and Education Consultants (forty-five i.e. 74%). Compared with Commerce and Professions training staff, Higher Education Staff are already an integral part of the education service, therefore it is perhaps surprising that they had not been used more by Authorities. Education Consultants, in delivering training in any chosen management training needs area, may 'buy in' the services of existing Higher Education Staff to assist in delivering 'their' management training programme.

Page 8 of the Questionnaire shows that training materials produced by LEA Staff and the LMS Initiative Training Package are of "High" significance. The training materials produced by LEA Staff are perceived as of "High" significance in 81% of the County Authorities and 79% of the Metropolitan District and Outer London Borough Authorities.

LMS Initiative Training Package materials are similarly of

comparable significance (41% "High" significance in County Authorities, 45% "High" significance in Metropolitan District and Outer London Borough Authorities). One other source of training material (the National Associations) was considered as of "High" significance by more than 25% of the responding Authorities.

Section One, Part C, will consider some of the patterns revealed by the 'global' analysis to enhance and deepen understanding of the Authority management training development. It will investigate other potential patterns which were implied in the Questionnaire.

SECTION ONE. PART C. THE 'IN-DEPTH' ANALYSIS OF 61 AUTHORITY RESPONSES TO THE QUESTIONNAIRE.

[Percentages expressed will refer to 61 Authorities, unless stated otherwise.]

In identifying training needs, only seven Authorities considered questionnaires to governors of "High" significance and also considered questionnaires to headteachers of "High" significance. Six Authorities considered written requests from governors and written requests from headteachers of "High" significance. Only five Authorities considered questionnaires and written requests from governors and headteachers to be of "High" significance in each category. Thus a relatively small group of Authorities considered forms of written communication to be of "High" significance and the most appropriate vehicle for identifying training needs of governors and headteachers. This analysis changes the impression gained from the global results of Page 1 of the Questionnaire that written communication was generally of "High" significance.

Applying this data analysis approach to verbal communication, it was of marginally higher significance than the questionnaires or the written requests in identifying governor training needs. For headteachers' training needs, verbal communication was the main method of identification.

Of the thirty-seven Authorities perceiving Officers to have "High" significance in identifying management training needs, nine Authorities (24% of 37) stated that verbal requests from governors and from headteachers were of "High"

significance in both categories. Of the thirty-seven, a further fifteen Authorities (41% of 37) responded that verbal request from governors and headteachers were of either "High" or "Medium" significance in both categories.

In the twenty-four Authorities where Officers were of "Medium", "Low" or "Nil" significance in identifying management training needs, four Authorities (16% of 24) stated that verbal requests from governors and from headteachers were of "High" significance in both categories. Of the twenty-four, a further six Authorities (25% of 24) responded that verbal request from governors and headteachers were of either "High" or "Medium" significance in both categories.

The more detailed analysis thus suggests that the flow of verbal communication contributed fairly significantly in identifying management training needs. This was more evident where Officers were of "High" significance, and in these thirty-seven Authorities only three (8% of 37) responded that questionnaires and written communication with governors and headteachers were of "High" significance in each category. Where Officers were of "Medium", "Low" or "Nil" significance in twenty-four Authorities, only two (8% of 24) responded that questionnaires and written communication with governors and headteachers were of "High" significance in each case.

In each of the three Authorities (Officers "High") and the two Authorities (Officers "Medium", "Low" or "Nil") verbal communication was also of "High" significance and so the

data begins to identify Authorities which were "High" communicators' irrespective of the significance of Officers.

The significance given to elected Members and political control in identifying management training needs was analysed to establish whether the fact that Authorities were having to implement and provide training for a change in the educational management of schools resulting from Conservative Government legislation had any impact on the identification of management training needs. The significance of Members is shown in Table 7.

TABLE 7.

A COMPARISON OF POLITICAL CONTROL AND THE SIGNIFICANCE OF MEMBERS IN IDENTIFYING MANAGEMENT TRAINING NEEDS.

CONSERVATIVE
CONTROLLED
AUTHORITIES

SDLP & INDEPENDENT
CONTROLLED
AUTHORITIES

LABOUR
CONTROLLED
AUTHORITIES

Significance of Members:

(Figures in brackets, below, indicate not an overall majority)

H	M	L	N	H	M	L	N	H	M	L	N
3	2	7	4			1		5	5	9	9
(2)	(3)	(1)	(1)	(1)		(1)	(1)	(3)		(2)	

Totals, and percentages beneath:

5	5	8	5	1	0	2	1	5	8	9	11
22%	22%	34%	22%	25%	0%	50%	25%	15%	24%	27%	33%

(With one Authority Conservative/SDLP equal seats: Members "Nil" significance.)

The analysis suggests that Members of Labour controlled Authorities were of generally slightly lower significance in identifying management training needs than Members in Conservative controlled Authorities.

The traditional political connection between the Labour Party and the Trade Unions was analysed. As has been seen (Questionnaire Page 2) the Trade Unions were generally of "Low" or "Nil" significance in identifying management training needs. However the two Authorities which did consider them of "High" significance were both Labour controlled. Of the eight Authorities considering the Trade Unions of "Medium" significance, five were Labour controlled. Three were Conservative controlled, one not having an overall majority of seats.

The Questionnaire was not designed specifically to identify the organisational 'culture' of each Authority. According to the culture of an Authority, Members might not have an overt influence on the activities of Officers; in other Authorities Members might be far more directive. Influence in areas of identified management training need may depend on whether the subject matter is apolitical. The National Curriculum is an example, though testing at the end of the four key stages is perhaps politically contentious.

In two areas of identified management training need there is a possible political-cultural connection which may reveal the Authority culture. Multi-ethnic education was not generally identified as one of the priority areas for management training, when the Questionnaire was sent to Authorities. Where it was identified as a management training need, however, the need for training would be more obvious, perhaps, in Authorities where there were concentrations of ethnic minority groups. These groups would be part of the Authority culture. Generally these groups

were likely to be geographically located in Outer London Boroughs and Metropolitan Districts rather than the Counties. The more detailed data analysis attempted to discover whether the management training strategy did reflect the culture within the Authority. Results are shown in Table 8.

TABLE 8.

A COMPARISON OF THE SIGNIFICANCE GIVEN TO MULTI-ETHNIC MANAGEMENT TRAINING BY AUTHORITIES.

OUTER LONDON BOROUGHES & METROPOLITAN DISTRICT COUNCILS (29)

**CONSERVATIVE
CONTROLLED**

**SDLP/INDEPENDENT
CONTROLLED**

**LABOUR
CONTROLLED**

Multi-ethnic education training significance:

H	M	L	N	H	M	L	N	H	M	L	N
1	3	1	1	0	0	0	1	8	4	9	1
17%	50%	17%	17%	0%	0%	0%	100%	36%	18%	41%	5%

COUNTY COUNCILS (32)

**CONSERVATIVE
CONTROLLED**

**SDLP/INDEPENDENT
CONTROLLED**

**LABOUR
CONTROLLED**

Multi-ethnic education training significance:

H	M	L	N	H	M	L	N	H	M	L	N
2	5	5	5	0	2	0	1	4	2	3	2
13%	29%	29%	29%	0%	67%	0%	33%	36%	18%	28%	18%

(With one Authority Conservative/SDLP equal seats: Multi-ethnic education training needs: "Nil" significance.)

TOTALS (all Authorities):

**CONSERVATIVE
CONTROLLED**

**SDLP/INDEPENDENT
CONTROLLED**

**LABOUR
CONTROLLED**

H	M	L	N	H	M	L	N	H	M	L	N
3	8	6	6	0	2	0	2	12	6	12	3
13%	35%	26%	26%	0%	50%	0%	50%	36%	18%	36%	10%

(For simplification the analysis has, with one exception above, taken the 'controlling' Party as stated, even though

it might not have an overall majority.)

The results show that Labour controlled Authorities, whether 'urban' or 'urban and rural', give a "High" significance to multi-ethnic management training needs. But, by combining "High" and "Medium" significance, there is little difference between Conservative and Labour controlled Authorities.

The same approach was applied to the issue of equal opportunities training, with the following results:

TABLE 9.

A COMPARISON OF THE SIGNIFICANCE GIVEN TO EQUAL OPPORTUNITIES MANAGEMENT TRAINING BY AUTHORITIES.

OUTER LONDON BOROUGHES & METROPOLITAN DISTRICT COUNCILS (29)

**CONSERVATIVE
CONTROLLED**

**SDLP/INDEPENDENT
CONTROLLED**

**LABOUR
CONTROLLED**

Equal opportunities training significance:

H	M	L	N	H	M	L	N	H	M	L	N
1	5	0	0	0	0	1	0	5	8	8	1
17%	83%	0%	0%	0%	0%	100%	0%	23%	36%	36%	5%

COUNTY COUNCILS (32)

**CONSERVATIVE
CONTROLLED**

**SDLP/INDEPENDENT
CONTROLLED**

**LABOUR
CONTROLLED**

Equal opportunities training significance:

H	M	L	N	H	M	L	N	H	M	L	N
6	3	4	4	0	2	1	0	5	2	2	2
35%	17%	24%	24%	0%	67%	33%	0%	46%	18%	18%	18%

(With one Authority Conservative/SDLP equal seats: Multi-ethnic education training needs: "Nil" significance.)

TOTALS (all Authorities):

**CONSERVATIVE
CONTROLLED**

**SDLP/INDEPENDENT
CONTROLLED**

**LABOUR
CONTROLLED**

H	M	L	N	H	M	L	N	H	M	L	N
7	8	4	4	0	2	2	0	10	10	10	3
31%	35%	17%	17%	0%	50%	50%	0%	30%	30%	30%	10%

(For simplification the analysis has, with one exception above, taken the 'controlling' Party as stated, even though it might not have an overall majority.)

Taking "High" significance alone, the Labour controlled Authorities do give marginally greater emphasis to equal opportunities management training than the Conservative controlled Authorities. But, considering the overall totals, the results show that there is little difference between Labour and Conservative Authorities.

With both the above analyses, therefore, the traditional image (i.e. 'culture') of the Labour Party defending the rights of ethnic minorities and promoting equal opportunities has not been clearly demonstrated in its influence on the identification of management training needs at the time of the research Questionnaire.

The 'global' analysis of Section One Part B of this Chapter considered the delivery of management training of governors and teaching staff separately or together. A more detailed search of the database analyses some of the possible influences on these strategies. The hypothesis to be tested is that Officers and Advisers have different perceptions of separate or joint training delivery, possibly relating to their traditional roles as administrators and curricular training providers, respectively.

The Officers considered of "High" significance in identifying management training needs and responsible for training were compared with Other Officers and Advisers of "High" significance. Table 10 presents the results, the

comparison taken from two important management training needs areas as illustrative of these different strategies.

TABLE 10.

A COMPARISON OF THE PERCEPTION OF OFFICERS AND ADVISERS IDENTIFYING MANAGEMENT TRAINING IN TERMS OF DELIVERY STRATEGY.

10A: THE NATIONAL CURRICULUM.

PERSONNEL IDENTIFYING TRAINING NEEDS "High"	Total	TRAINING DELIVERY for GOVERNORS and SCHOOL STAFF		
		Separate	Joint	No Preferred Method
LEA Officer Responsible for Training	37	23 (62%)	9 (24%)	5 (14%)
Advisers	12	9 (75%)	2 (17%)	1 (8%)

10B: FINANCE AND BUDGETING

PERSONNEL IDENTIFYING TRAINING NEEDS "High"	Total	TRAINING DELIVERY for GOVERNORS and SCHOOL STAFF		
		Separate	Joint	No Preferred Method
LEA Officer Responsible for Training	37	14 (38%)	18 (49%)	5 (13%)
Advisers	12	3 (25%)	8 (67%)	1 (8%)

Officers Responsible for Training perceive the need for separate National Curriculum management training. The Advisers perceive this even more so and, with only 8% recording "No Preferred Method", have a clearer perception of a management training strategy than the Officers (14% "No Preferred Method").

For Finance and Budget management training Officers Responsible for Training perceive the need for management training being delivered jointly, and again the Advisers have a clearer perception of this delivery strategy. The

Advisers have only 8% recording "No Preferred Method" compared with the Officers (13%). However, the percentages do not show such a clear perception of a strategy for "Separate" or "Joint" training. Compared with the National Curriculum, as Finance and Budgeting is the new area of management training for all school governors and staff it may take longer for a clear delivery strategy to evolve.

The same comparative methodology was applied to Officers and Advisers of combined "Medium", "Low" and "Nil" significance. Identical strategies were revealed as in Tables 10A and 10B, but the percentage differences between separate and joint training were smaller; a higher percentage of "No preferred method" was recorded in each case. (Appendix 16).

The analysis above is for personnel identifying the management training needs. It would seem likely that in many Authorities those personnel would also be responsible for delivering the training, but not necessarily in all cases. In the two chosen training needs areas, for Officers delivering training the perception analysis of National Curriculum training is very similar to the Officer responses Table 10. (Results are in Appendix 17) The Advisers similarly perceive the need for separate training, but are not quite so clearly in favour of separate training as in Table 10. The Officers Responsible for Training perceive Finance and Budgeting to be delivered jointly, as do the Advisers.

Appendix 18 shows the analysis of Officers and Advisers of combined "Medium", "Low" and "Nil" significance. Similar

strategies were revealed as in Appendix 16), but the percentage differences between separate and joint training were smaller; a higher percentage of "No preferred method" was recorded in each case.

An analysis of the impact of the source of management training identification on the delivery of management training strategy produced the results in Table 11 which, once again, do not establish a direct cause-and-effect link but would indicate that the sources of identification may have influenced the strategies.

TABLE 11.

A COMPARISON OF THE SOURCE OF MANAGEMENT TRAINING NEEDS IDENTIFICATION AND THE PERCEPTION OF DELIVERY STRATEGY.

15A: THE NATIONAL CURRICULUM

SOURCE of TRAINING NEED IDENTIFICATION:	Total	TRAINING DELIVERY for GOVERNORS and SCHOOL STAFF		
		Separate	Joint	No Preferred Method
"High"				
Questionnaire to Governors	21	10 (48%)	5 (24%)	6 (28%)
Verbal Requests from Governors	21	11 (52%)	7 (33%)	3 (15%)
Verbal Requests from Headteachers	17	10 (59%)	4 (24%)	3 (17%)

15B: FINANCE AND BUDGETING

SOURCE of TRAINING NEED IDENTIFICATION:	Total	TRAINING DELIVERY for GOVERNORS and SCHOOL STAFF		
		Separate	Joint	No Preferred Method
'High'				
Questionnaire to Governors	21	7 (33%)	8 (38%)	6 (29%)
Verbal Requests from Governors	21	6 (29%)	11 (52%)	4 (19%)
Verbal Requests from Headteachers	17	6 (35%)	7 (41%)	4 (24%)

Generally, where questionnaires and verbal requests are considered of "High" significance in identifying management training needs, Authorities are more likely to be training governors and headteachers separately for the National Curriculum. They are likely to be delivering training together for Finance and Budgeting.

In the context of this study the purpose of the two database analyses above is to attempt to identify any patterns in the Questionnaire responses which might indicate whether Authorities have designed management training delivery strategies based on the perceptions of Authority staff or those of the governors and headteachers, or a combination of the two. Comparing Table 10 and 11, it is noticeable that for the National Curriculum Officers and Advisers have a greater preference for separate training and, though the pattern is not quite so consistent, a preference for joint training for Finance and Budgeting.

An attempt to aggregate the "High" significance of management training needs identification and management training delivery personnel categories, and to relate this aggregation to the delivery strategies devised, proved statistically inconclusive. The tentative conclusion drawn is that an Authority management training delivery strategy is devised as a joint response to the significance placed on management training need identification and delivery by governors and headteachers, Officers and Advisers. However Authority personnel may have the greater influence on strategy. Chapter Six will discuss and make recommendations about the methodology for future training strategy delivery.

The significance of the materials used by Authorities in their management training delivery varied according to the significance of the delivery personnel, as shown in Table 12.

TABLE 12.

A COMPARISON OF THE AUTHORITY SIGNIFICANCE OF PERSONNEL RESPONSIBLE FOR TRAINING DELIVERY AND THE SOURCE MATERIALS USED IN TRAINING.

Significance of Materials Used:	LEA OFFICER RESPONSIBLE FOR TRAINING "High" Total 41	LEA OFFICER RESPONSIBLE FOR TRAINING Not High Total 20	ADVISERS DELIVERING TRAINING "High" Total 25	ADVISERS DELIVERING TRAINING Not High Total 36
LEA MATERIALS				
High	39 (95%)	10 (50%)	22 (88%)	27 (75%)
Medium	2 (5%)	5 (25%)	3 (12%)	4 (11%)
Low	0 (0%)	4 (20%)	0 (0%)	4 (11%)
Nil	0 (0%)	1 (5%)	0 (0%)	1 (3%)
LMS INITIATIVE MATERIALS				
High	20 (48%)	4 (20%)	13 (52%)	13 (36%)
Medium	9 (22%)	6 (30%)	5 (20%)	10 (28%)
Low	2 (5%)	5 (25%)	2 (8%)	5 (14%)
Nil	10 (25%)	5 (25%)	5 (20%)	8 (22%)
OU MATERIALS				
High	8 (19%)	6 (30%)	6 (24%)	9 (25%)
Medium	12 (29%)	7 (35%)	8 (32%)	11 (31%)
Low	11 (27%)	4 (20%)	6 (24%)	9 (25%)
Nil	10 (25%)	3 (15%)	5 (20%)	7 (19%)
NATIONAL ASSOCIATION MATERIALS				
High	12 (29%)	5 (25%)	7 (28%)	10 (28%)
Medium	13 (32%)	5 (25%)	8 (32%)	10 (28%)
Low	6 (14%)	2 (10%)	4 (16%)	4 (11%)
Nil	10 (25%)	8 (40%)	6 (24%)	12 (33%)

Where Officers and Advisers are of "High" significance in the delivery of management training, the Authorities perceive their own materials to be of "High" significance. There is no clear pattern as to the significance of OU and

National Association materials.

To assess whether the length of management training that Authorities had been providing for governors, headteachers and senior staff had influenced the significance of LEA-produced materials and those that may be purchased, such as the LMS Initiative materials, an analysis of significance revealed the pattern in Table 13.

The analysis shows that Authorities with less than six months of management training experience do not place such "High" significance on their own materials as those Authorities with more than six months of management training experience. The statistical significance of Authorities with more than eighteen months of management training experience i.e. $n=6$, or less, is not reliable.

TABLE 13.**A COMPARISON OF AUTHORITIES' PERCEPTIONS OF THE SIGNIFICANCE OF TRAINING MATERIALS AND THE LENGTH OF TRAINING DELIVERY.****19A: LEA MATERIALS**

Months of Training: Authorities perception of significance:

	HIGH	MEDIUM	LOW	NIL	Total
Less than 6 Months	10 (56%)	5 (28%)	2 (11%)	1 (5%)	18
6 to 12 Months	18 (95%)	0 (0%)	1 (5%)	0 (0%)	19
12 to 18 Months	9 (90%)	0 (0%)	1 (10%)	0 (0%)	10
18 to 24 Months	5 (83%)	1 (17%)	0 (0%)	0 (0%)	6
24 to 30 Months	3 (100%)	0 (0%)	0 (0%)	0 (0%)	3
30 to 36 Months	2 (100%)	0 (0%)	0 (0%)	0 (0%)	2
More than 36 Months	2 (67%)	1 (33%)	0 (0%)	0 (0%)	3

19B: LMS MATERIALS

Months of Training: Authorities perception of significance:

	HIGH	MEDIUM	LOW	NIL	Total
Less than 6 Months	6 (33%)	2 (11%)	3 (17%)	7 (39%)	18
6 to 12 Months	8 (42%)	6 (32%)	3 (16%)	2 (10%)	19
12 to 18 Months	6 (60%)	1 (10%)	1 (10%)	2 (20%)	10
18 to 24 Months	2 (33%)	3 (50%)	0 (0%)	1 (17%)	6
24 to 30 Months	1 (33%)	2 (67%)	0 (0%)	0 (0%)	3
30 to 36 Months	0 (0%)	1 (50%)	0 (0%)	1 (50%)	2
More than 36 Months	2 (67%)	0 (0%)	0 (0%)	1 (33%)	3

"Months" and "Years" of management training delivery do not necessarily identify the extent of the development of the training strategies. The Questionnaire requested details of the "Phases" of management training. This phasing approach would allow an Authority to enter, for example, the second or third phase within a year if it developed more positively. However no obvious correlation between the Authorities passing through phases of management training and any increase or decrease in the significance of the source of the management training materials was detected. (Appendix 19)

Generally, the LEA Materials are perceived to be of 'higher' significance than LMS Materials, irrespective of the phase of management training. LEA Materials and LMS Materials are perceived by a relatively small percentage of Authorities planning the details of the introductory phase of management training (55% LEA Materials, 27% LMS Materials) to be of "High" significance. In contrast the greatest percentages of "High" significance (91% for LEA Materials, 52% LMS Materials) are perceived by Authorities planning details of the secondary phase of management training. It is during the delivery of introductory training, the assessment of the introductory phase and the planning of the secondary phase that the contribution and significance of the source materials comes into focus.

To assess whether the significance of personnel delivering management training changed over time or with the 'phase' of management training, "High", "Medium" and "Low" perception responses of Authorities were weighted to calculate an

'average value'. Weighting attempted to correct the imbalance caused by the numbers of Authorities in each category of management training experience, expressed in months. (Appendix 20)

Weighted results require a note of caution for, as Evans pointed out:

Translating qualitative scores into numerical ones involves the assumption that the differences between adjacent pairs of scores are equal at all points of the scale. Before translating scores and embarking on elaborate calculations, the extent to which that assumption is justified should be carefully considered. (Evans 1984 p37)

As "High", "Medium" and "Low" are value judgements, and the value judgement of one respondent may not be that of another, it cannot be confidently claimed that the numerical weightings are a reflection of "differences between adjacent points (that) are equal". All that can be said is these weightings may help to detect the pattern which might be anticipated, but social science research should guard against figures which help to 'prove' predictions.

The analysis revealed the general trend of an increase in 'average values' for Officers and Advisers for management training up to thirty months. LEA Officer average values increase by 1.17 and Adviser average values increase by 0.56 during this time. After thirty months the pattern is less clear.

The same methodology, again weighting responses, revealed an increase in average values for Officers and Advisers for management training as each phase of training is completed. Officer average values increase by 1.07 and Adviser average

values increase by 0.66 during this these phases. (Appendix 21)

It is appropriate at this point to compare results from an NFER survey of Authorities with the Questionnaire results before a discussion of themes, and recommendations for future training can be made with confidence.

SECTION TWO. A COMPARISON OF THE QUESTIONNAIRE WITH THE RESULTS OF THE NFER SURVEY OF AUTHORITIES.

The NFER survey research was carried out by Roberts and Baker who published their results in April 1988, therefore pre-dating the research Questionnaire by approximately eighteen months. In summary they found introductory training being delivered by Authorities, and by some training agencies on an ad hoc basis. A need for in-depth training more appropriate to governors' roles was identified, with levels of training covering familiarisation, role and task-specific training, and 'one-off' courses. The quality of training and materials being used varied.

The research Questionnaire was designed without reference to the NFER survey, seeking different emphases in the search for comparative data from Authorities. However the surveys have common themes and so comments and interpretation will be focused on these.

The NFER survey achieved a higher response rate (eighty-three compared with the Questionnaire sixty-one), the Authority responses being:

County	NFER 39	Questionnaire 32
Metropolitan Districts	NFER 29	Questionnaire 16
Outer London Boroughs	NFER 15	Questionnaire 13

The fact that Authorities had been presented with the NFER survey several months before the similar research Questionnaire arrived may have reduced their willingness to respond. The NFER survey was an 'official' survey, the Questionnaire was 'private research'; this may also have

reduced the willingness of Authority Officers to respond. The NFER survey supports the suggestion made in Chapter Three and supported by Roberts and Baker that:

As the people completing the questionnaires were usually responsible for school governor training in their authorities and as this is a centrally controlled function in most authorities, the overall accuracy of the replies given is expected to be high. (Roberts and Baker 1988 p3)

The management training needs identified by NFER are presented in summary below, with Questionnaire responses for comparison, where appropriate:

TABLE 14.

A COMPARISON OF NFER AND RESEARCH QUESTIONNAIRE RESPONSES ABOUT THE CONTENT OF MANAGEMENT TRAINING.

NFER SURVEY (83 Authorities) QUESTIONNAIRE (61 Authorities)

TOPIC	NUMBER OF RESPONSES	High	Medium	Low	Nil
Roles, functions	58	43	10	5	3
Aims of curriculum	54	48	11	2	0
Recruitment, selection of staff	52	47	11	3	0
Effective in meetings	46	n/a			
LEA structure and function	46	n/a			
National education finance	39	n/a			
Effective chairing	38	n/a			
Visiting schools	38	n/a			
Local Financial Management	35	51	8	2	0
School and community	33	n/a			
Annual meetings	32	n/a			
Special educational needs	32	11	25	23	2
Equal opportunities	25	17	20	16	8
Sex education	22	10	27	21	3
Multi-cultural education	20	15	16	18	12
Other	8	n/a			

In making a comparison of the two surveys it is acknowledged that the different wording and the choice of response methodology might have resulted in an Authority Officer responding differently to each survey. The NFER's "which topics are covered?" contrasts with the Questionnaire's "priority in the preparation for training", for example.

With these reservations the comparison above shows that generally the NFER survey and the Questionnaire survey have produced similar management training needs identification. The comparison perhaps also shows that between the surveys the awareness of the need for management training for finance and budgeting had increased significantly, being ninth in the list in the NFER survey; it was the most significant, jointly with 1986 and 1988 Act Details, in the Questionnaire responses.

The NFER survey considered the personnel who were providing management training. The results (Roberts and Baker 1988 p11), with Questionnaire responses reproduced where appropriate as a comparison, are presented below:

TABLE 15.

A COMPARISON OF NFER AND RESEARCH QUESTIONNAIRE RESPONSES ABOUT THE PROVIDERS OF MANAGEMENT TRAINING.

NFER SURVEY (83 Authorities)		QUESTIONNAIRE (61 Authorities)				
PROVIDERS OF TRAINING		NUMBER OF				
		RESPONSES				
			High	Medium	Low	Nil
LEA Staff	57	*a	41	12	3	5
		*b	25	19	10	7
Headteachers/teachers	37		16	21	9	15
Experienced governors	26		12	18	13	18
College of HE/FE staff	19	*c	2	3	12	44
		*d	8	9	11	33
Religious authorities	18		5	9	15	32
NAGM	14		n/a			
Other consultants/lecturers	10	*e	7	8	7	39
		*f	3	3	10	45
Universities (not OU)	10		1	5	14	14
Workers' Educational Association	8		n/a			
Open University	6		n/a			
Teachers' Centre Staff	4		n/a			
Local PTA	2		n/a			
Local/regional Parent Gov. Assoc.	2		n/a			
Other FE or HE	2		n/a			

Key:

- *a Questionnaire: "LEA Officers responsible for training"
- *b Questionnaire: "Advisers"
- *c Questionnaire: "Higher Education staff"
- *d Questionnaire: "Adult Education staff"
- *e Questionnaire: "Other community tutors"
- *f Questionnaire: "Education Consultants"

The NFER survey supports the Questionnaire findings that LEA staff, advisers and headteachers deliver most of the management training, additional inputs coming from a variety of other personnel.

When comparing the results of the analyses of the materials used in training delivery a summary of Roberts' and Baker's findings (1988 p9, 10) and the Questionnaire revealed:

TABLE 16.

A COMPARISON OF NFER AND RESEARCH QUESTIONNAIRE RESPONSES ABOUT TRAINING MATERIAL USED.

NFER SURVEY (83 Authorities)		QUESTIONNAIRE (61 Authorities)			
MATERIALS OF TRAINING	NUMBER OF RESPONSES	High	Medium	Low	Nil
LEA material	36	49	7	4	1
Open University	11	15	19	15	12
NAGM	9	17	18	8	18

NFER results concur with the Questionnaire finding that LEA materials were the most significant resource, with Open University material being used as additional support. The Questionnaire might indicate also that during the time between two surveys the Authorities were beginning to place a greater emphasis on their own training materials. The NFER survey was too early for LMS Initiative Materials to appear in the results.

These are the only useful comparisons which can be made between the two surveys based on statistical information.

The results suggest that the Questionnaire survey, though not achieving such a high response rate, provided reliable information on which to base discussion and interpretation.

SECTION THREE. SOUTH GLAMORGAN'S RESPONSE TO THE QUESTIONNAIRE SURVEY.

The Questionnaire was filled in by Officers with partial responsibility for the design and implementation of management training, but not with influence on the purpose or design of the Questionnaire itself. The results are shown in Appendix 22.

The responses show that the Authority's management training programme is not significantly different from the pattern of the other Authorities. The comparative approach used when comparing batch responses in Section One, Part A shows general similarity in the pattern of responses of South Glamorgan and other Authorities, as shown in Table 17.

South Glamorgan gave "High" significance to a questionnaire to governors and to LEA Officers responsible for management training, in determining training needs. It sought the views of governors and headteachers at public meetings about Local Management of Schools, and these were of "Medium" significance. "Low" priority was given to the use of a range of personnel from a variety of 'adult education' backgrounds to identify management training needs and to deliver management training.

TABLE 17.**A COMPARISON OF RESPONSES FROM 61 AUTHORITIES AND THE RESPONSES OF SOUTH GLAMORGAN TO THE RESEARCH QUESTIONNAIRE.**

Questionnaire Text	Number of Box Responses (Questionnaire Choices)	Authority Responses Maxima Correspond with South Glamorgan	Percentage of Maxima Corresponding
(One in four chance of maxima corresponding)			
Identification of Training Needs Source (Pages 1 & 2)	22	10	46%
Identified Training Needs (Pages 3 & 4)	19	7	37%
Identified Training Needs Preferred Method (Pages 5 & 6)	19	13	68%
Method of Training Delivery (Personnel) (Page 7)	11	3	27%
Method of Training Delivery (Materials) (Page 8)	15	5	33%

In South Glamorgan five "High" priority management training needs were identified: National Curriculum, Finance and Budgeting, Legal Responsibilities, Interviewing and Staff Selection, and the Roles of Governors. The 1986 and 1988 Act Details and Governing Body Procedures were of "Medium" priority, the Authority deciding to combine certain aspects of these, with Legal Responsibilities and Roles and Responsibilities, to make two training modules.

South Glamorgan perceived a desire for governors and headteachers to be trained together in 1986, 1988 Act

Details, the National Curriculum, Health/Sex Education, Legal Responsibilities, Governing Body Procedures and Roles of Governors. There was no clear indication of a wish for senior staff to become part of the management training process at this stage, other than in the area of Finance and Budgeting training. For General Management Skills and Interviewing and Staff Selection Skills governors and headteachers preferred to be trained separately. There was no preference expressed for primary and secondary school governors, headteachers and senior staff to be trained separately.

"High" significance was given to Officers in South Glamorgan for the delivery of management training, using Authority materials and the training delivery strategy was based on institution locations. Less than half a year had been given to identification and preparation for management training and the Authority was delivering its introductory management training phase.

In general these comparative results indicate that there is nothing obvious in the Questionnaire data to suggest that South Glamorgan is an untypical Authority in terms of its management training programme. If this conclusion is accepted, the use of South Glamorgan case study material and data should invoke discussion which could have come from the case study details from any other Authority.

SECTION FOUR. THE RESULTS OF MONITORING INTRODUCTORY GOVERNOR MANAGEMENT TRAINING IN SOUTH GLAMORGAN.

Roberts and Baker note that 78% of LEAs responding to their survey obtained feedback from participants on courses. They stated:

Most carried out their evaluation by means of a questionnaire at the conclusion of the course or through an evaluation or feedback meeting. Any further study of governor training should attempt to assess how this evaluation information is used in the design of later programmes. (Roberts and Baker 1988 p12)

As has been outlined in Chapter Three, South Glamorgan's evaluation was designed to provide the Authority with information on which to base later programmes. The five introductory training modules were assessed by participants on a scale of 1 to 8 in three areas:

ENJOYMENT:

Did not enjoy training (1)....to....Did enjoy training (8)

LEARNING EXPERIENCE:

Training did not teach (1)....to....Training did teach (8)

RELEVANCE TO GOVERNORS' RESPONSIBILITIES:

Not relevant (1)....to....Relevant to responsibilities (8)

The results of assessments by 160 governors were are shown in Table 18.

The management training module for Governing Body Meetings received a much higher average score for "Enjoyment" than other modules. The module concentrated very much on 'role play' and therefore governors had an active session which promoted enjoyment. The other four modules included time spent in group participation in problem solving, but there was a 'formal' input which may have lowered the overall

level of enjoyment.

TABLE 18.

THE RESULTS OF GOVERNOR GROUP MONITORED ASSESSMENT OF MANAGEMENT TRAINING.

TRAINING NEED:		Maximum Recorded	Minimum Recorded	Average Calculated	Requests for in- depth Training
GOVERNING BODY MEETINGS	Enjoyment:	8	6	6.82	10
	Learning:	8	1	3.95	
	Relevance:	8	4	5.70	
LEGAL, ROLES, RESPONSIBIL- ITIES	Enjoyment:	8	2	5.49	70
	Learning:	8	2	5.41	
	Relevance:	8	4	6.67	
BUDGETS & FINANCE	Enjoyment:	8	3	5.25	75
	Learning:	8	2	5.87	
	Relevance:	8	1	5.86	
STAFF SELECTION	Enjoyment:	8	4	5.80	48
	Learning:	8	2	5.81	
	Relevance:	8	4	6.57	
NATIONAL CURRICULUM	Enjoyment:	8	1	5.14	37
	Learning:	8	1	4.82	
	Relevance:	8	1	6.03	

Governing Body Meetings received the lowest average score for "Learning". By the time governors attended management training sessions they already had experienced several meetings which may account for the management training 'teaching' them little. The National Curriculum average "Learning" score was not very high. As the National Curriculum's implementation is central to education, and as its structure is quite complex, this low score must be interpreted as reflecting a poorly designed module. It is noticeable that the National Curriculum was the only module to record three minima scores of 1.

The large number of requests for in-depth management training reflect the concern for finance and budgeting

training. At that time the governors had been given their first sight of 'model' budgets. These had a significant impact on the governors' awareness of their increased responsibilities. The governors also had a growing awareness of the increased legal and general responsibilities, and the roles they would have to take on in discharging their responsibilities. The large number of requests for in-depth management training for this module reflect their concern.

As a further sampling technique, a number of volunteer governors were tested before and after their training. These results are a cross-check on learning ("Knowledge"), and relevance ("Knowledge" and "Confidence", and possibly "Attitude"). These results are presented in the next Section.

**SECTION FIVE. THE RESULTS OF MONITORING VOLUNTEER GOVERNORS
BEFORE AND AFTER MANAGEMENT TRAINING.**

The results of the objective assessment of the thirteen governors are presented in Table 19.

TABLE 19.

**RESULTS OF MONITORED VOLUNTEER GOVERNORS' RESPONSES TO
STIMULUS.**

	KNOWLEDGE		CONFIDENCE		ATTITUDE	
	Range: 0 to 160		-20 to + 20		-20 to +20	
GOVERNOR CODE	Before Training	After Training	Before Training	After Training	Before Training	After Training
1.	79	102	+17	+18	-7	-3
2.	77	77	+12	+18	0	0
3.	91	98	+5	+10	+10	+9
4.	84	85	+10	+11	-1	0
5.	91	96	+11	+13	+5	+5
6.	65	70	+3	+4	+9	+7
7.	11	12	+3	+4	+6	+6
8.	38	41	+8	+7	+4	+2
9.	30	33	+9	+10	+8	+8
10.	32	47	+7	+8	+4	+5
11.	44	86	+5	+8	+12	+7
12.	30	30	+13	+11	+10	+11
13.	90	92	+19	+19	+7	+5
Totals:	762	869	+122	+141	+67	+62

With a small sample of only thirteen governors the results must be considered with caution. Two governors (Numbers 2 and 12) failed to record increased knowledge; the greatest increase was recorded by Number 1. There is insufficient data to test whether those originally recording a high score increased their score more than those originally with low scores, either in absolute or relative terms. Overall, the management training appears to have increased their knowledge.

Two governors (Numbers 8 and 12) recorded a lowering of

confidence. Governor Number 2 recorded the greatest increase in confidence. The overall pattern seems to be that training had contributed to the increased confidence, but increased confidence could equally have come from their increased experience as governors. There is insufficient data to correlate increased knowledge leading to a commensurate increase in confidence.

Three governors (Numbers 2, 7 and 9) recorded no change in their attitudes after the management training. The other ten governors recorded some changes, but no clear pattern emerged.

In summary, it appears that management training may have contributed to changes in the knowledge, confidence and attitudes of these volunteer governors. Taped interviews of volunteer governors were designed to examine this conclusion further.

SECTION SIX. TAPED INTERVIEWS WITH THIRTEEN VOLUNTEER PARTICIPANTS.

The interview information collected by this method can not be presented as 'data'. The background details of the thirteen volunteer participants can be described purposefully at this point however for, though inevitably with a small group of volunteers there is a restricted range of socio-economic factors to consider, the group that emerged was reasonably 'broad-based'.

Six of the thirteen volunteer governors were male. All thirteen had been in employment (three were retired), though three of the seven females were bringing up children and were either not currently employed or were doing part-time work. Three of the participants described themselves as 'working class'; ten were 'middle class'. Three of the participants were LEA-nominated governors, two were co-opted from the local community, eight were parent governors.

The relevant comments made during the interviews (schedule Appendix 23; example transcript Appendix 24) which contribute to an understanding of the quality of South Glamorgan's management training programme will be presented in the next Chapter.

SECTION SEVEN. A SUMMARY OF THE DATA PRESENTED AND ITS USE IN INTERPRETATION AND DISCUSSION IN CHAPTER FIVE.

The research has collected a sufficiently large Authority Questionnaire response, supported by an NFER survey of Authorities, to detect a basic 'core' of management training modules. The methods of identifying management training needs, the delivery personnel, materials used in delivery and the strategy for delivery have been presented.

Taking South Glamorgan as a case study it has been found that the Authority's management training programme appears to be very similar to those of other Authorities. However, as Bolam pointed out:

In evaluation researchprecise hypotheses cannot usually be generated or tested;data collection is dependent upon both feasibility and the actions of other people; variables can rarely be controlled either by randomisation or by the use of control groups. (Bolam 1987 p3)

While Chapter Three stressed the need to attempt to 'triangulate' in cross-referencing data, and Chapter Five will discuss the supporting evidence which resulted from this, Bolam warns that the hypothesis, i.e. that South Glamorgan is 'typical' in its management training programme, is not precise and cannot be verified. South Glamorgan case study material can therefore only be presented in that it may contribute to the general understanding of the Local Management training process.

Chapter Four has presented data which would suggest that South Glamorgan's management training is reasonably successful, based on feedback from monitored governor training programmes and from the volunteer governors in-

depth analysis. However this apparent result must be considered cautiously in Chapter Five because it is not necessarily the case that variables (for example the quality of governor training, the amount of learning, the degree of enjoyment) are related to the outcome (i.e. better school management). This is as Weisberg and Bowen observed:

An important perspective is that relationships between variables are usually smaller than we would expect. It is best to admit this rather than to over-interpret tables.

Even when major differences are found, causation is not proven. The role of other variables in affecting the dependent variable must be examined before one can speak of causes. (Weisberg and Bowen 1977 p144)

South Glamorgan training in-depth analysis seems to indicate a successful management training programme, but readers should not assume that the approach will necessarily easily 'translate' into their own Authority culture. Nor will 'successful management training' necessarily correlate with 'competent management'. The analysis is presented to reveal potential strengths and weaknesses of management training which readers may find of use in developing their own programmes.

Chapter Five will analyse and comment on the management training 'themes' which have emerged from the research, supported by appropriate evidence largely from Chapters Two and Four.

CHAPTER FIVE

A DISCUSSION OF THE MANAGEMENT TRAINING THEMES WHICH HAVE EMERGED FROM THE RESEARCH.

PREFACE: The Chapter will begin to examine the broader management training themes which this research has identified as being important during the period covering approximately 1988 to 1990. The themes will be drawn from the literature reviewed in Chapter One and Chapter Two and the data presented in Chapter Four. In this Chapter additional sources of supporting literature and comment which contribute to building the corporate 'weltanschauung' of management training will be presented.

The Chapter will include interview comments from the South Glamorgan volunteer governors used for the in-depth study, selecting those comments which seem either to typify the volunteer governor group as a whole, or which showed a particularly penetrating insight into a facet of training which would otherwise have been over-looked. Individual comments which introduce specific issues, those mentioned by more experienced or 'perceptive' governors for example, or those issues which seem to represent a particular bias will be included if they reflect observations found elsewhere in the research literature.

The Chapter will be divided into Sections, each looking at a specific theme.

Section One will address the theme of the 'ownership' of the management training process.

Section Two will discuss the relative position of Officers and Advisers in the management training process.

Section Three will look at some of the finer details of the training being delivered by Authorities.

Section Four will examine finance and budgeting management training specifically, this being one of the major interests of this study.

Section Five will investigate the theme of the styles of management training delivery, concentrating on the adult education issues which are important to successful training schemes.

Section Six will summarise the points discussed and will anticipate the content of Chapter Six where recommendations for future management training will be made.

SECTION ONE. THE 'OWNERSHIP' OF THE MANAGEMENT TRAINING PROCESS.

'Ownership' of the management training process is a broad term covering all the influences which could affect the management training process at one or a number of levels in the 'hierarchy' of management training strategy design and implementation. As there will be many potential influences the Section is investigating 'joint ownership', but not necessarily equal ownership. The Section will consider whether relatively powerful interest groups in the training 'equation' may be attempting to gain either complete or significant control or ownership of the management training process.

Direct and indirect influences affect the ownership of management training, but ownership need not be considered a negative feature of the management training process. This Section will consider whether ownership or control of management training seems, ultimately, to contribute to or enhance the good management of schools to the benefit of pupils. If so, this would be considered acceptable ownership. But ownership which indicates a struggle for power itself, possibly subsuming pupil needs, would be considered unacceptable ownership.

Section One will investigate "ownership" by discussing those with influence on the content and messages of management training, particularly those people or groups without whom the management training programme might have developed in a different way. Ownership is thus the product of an influence 'force field' on a dynamic management training process,

capable of responding to the forces applied to it. The Section is therefore a complex force field analysis.

The implementation of the management training process involves those who design and deliver the programme. It is not always the case that the designers deliver the programme themselves. In South Glamorgan, only about one quarter of the governor training advisory panel were involved in delivering the governor management training itself.

The traditional model of management training would place the ownership of the training programme in the hands of the designers and deliverers. The classic example in Primary and Secondary education is that of the teachers deciding what, and how, to teach pupils. In Secondary education examination syllabi place some constraints on content, reducing the ownership, but teachers can still choose between modules or options.

As education evolves it could be argued that ownership of the process is reviewed: the implementation of the National Curriculum is a good example. The content (i.e. the attainment targets) recommended by the Working Groups of the National Curriculum Council may be considerably influenced by those outside the classroom, those not delivering the training programme and some Working Groups have been criticised for not including sufficient practitioners. Here ownership begins to pass out of the teachers' hands. The only aspect of ownership they retain is the methodology to be employed in the classroom.

In contrast, Local Management of Schools does not have a

prescribed 'curriculum', but an introductory curriculum has emerged, based on the six areas of management training need identified by the Questionnaire survey. (The contrast of the Questionnaire and Table 1 analyses, commented on in Chapter Four, must be borne in mind.) However the management training needs have been identified, partly at least, by the 'clients' i.e. the governors, themselves. This illustrates the concept of ownership of management training quite well. But, compared with the long-established school syllabus (and the National Curriculum which, in many cases, extends and formalises existing good practice in schools), the Local Management syllabus is new. Because of this the ownership of management training might be considered as a more contentious issue - perhaps a more significant 'prize' for those who achieve control.

There are several parties who would seem to have a vested interest in the control of, or the influence over, management training programmes. Reed and Hall observed: "The Secretary of State now has much greater powers and is therefore in this sense a ubiquitous stakeholder." (Reed and Hall 1989 p22) Therefore, perhaps working through HMI, the Secretaries of State would wish to see governor training programmes which are positive in their message and support the handing over of delegated power. The training programmes should demonstrate that the new management responsibilities are well within the capabilities of trained governors and headteachers and that delegation is a very logical progression of their responsibilities.

An Authority could in many ways be in a more ambivalent

position. If the Authority is Conservative controlled it will be expected to be in sympathy with Conservative Government legislation; Authorities controlled by Opposition Parties may be less supportive. Furthermore, the amount of political influence in the working of an Authority may affect the ownership of the training programmes being devised. This situation is made more complex by the fact that Authorities themselves are having to delegate their traditional management responsibilities, and this they may not wish to do, irrespective of political influence. In this instance an Authority is effectively being asked to provide the governing bodies with the means of removing responsibility from the Authority. Delegation could thus be viewed as reducing the demands made by the schools, as clients, on Authority expertise. This reduced dependency could contribute to the demise of the Authorities themselves, but much will depend on the amount of continuing support that governing bodies require, and whether Authorities remain the providers of support.

Like some Authorities, governing bodies will also be in a difficult position as they include political nominees. These governors, by the nature of their official duties, will be aware of the Authority's mission statement and corporate plan but they will also be cognizant of the management training needs of the governors with whom they have to manage. Authority and school perspectives may not be shared. Most of the governors on the governing body will not be political nominees, however, and they therefore fall quite clearly into the 'receiver' cohort in the training process.

Headteachers and senior staff fall into this cohort also.

Esp summarised the problem:

Whether governors or the local community choose to comply with LEA policies will depend in part on the ability of the LEA to undertake effective consultations with the schools and the communities they serve.

Coopers and Lybrand (1988) see the setting of aims and objectives as an interactive process between the schools and the LEA with the schools taking the initial lead. Not all LEAs will be happy to accept a lead from the schools and a reactive rather than a proactive role.

Detailed guidelines will have to reflect the new relationship between the LEA and the school and many administrators and elected members will have to change their traditional approaches if the new rules are to work constructively. (Esp 1989 p173)

Parents and the wider school community are less obviously concerned with the management training process, but in that the school and its management are publicly accountable it could be argued that there is at least an indirect interest. Indirect influences may be the by-product of the on-going education debate that the community will be part of. Any problems experienced by a governing body, any difficult questions raised at annual parents' meetings, or letters from the community about specific educational issues, will make governor trainers look at the training modules and consider whether these need revision. The more problems expressed by groups, the more likely it is that the management training process will need to respond to these.

The author has noted evidence of interest in training at annual parents meetings where governors had reported that they were unable to provide information on a specific issue of concern, or they didn't feel that they had sufficient

experience or expertise to give detailed replies to 'matters arising'. The author listened to parents' comments which amounted to implicit criticism of the lack of support that the governors were receiving from the Authority.

A number of potential owners of the management training process have been identified in the discussion above and the Section will consider the evidence for ownership.

Other than the LMS Initiative video which many governors criticised as being politically biased, considering the extensive nature of Conservative legislation there was perhaps surprisingly little evidence of Government ownership or influence of training. There were no DES or Welsh Office courses for governor trainers, for example: Authorities developed their own training. Chapter Two of this research commented on Sayer's reservations about a hidden agenda of control by the Secretary of State, but only one interviewed governor, a Labour Party nominee who clearly had severe reservations about the legislation, expressed even indirect concern.

He focused on the South Glamorgan finance and budgeting module which attempted to explain the nature of formula funding required by the legislation and outlined the decisions that various situations might demand. Mr. T. commented:

They (the trainers) were actually going a little bit overboard regarding this emphasis that they (the governors) were here to save a pound there and spend a pound here. Although I didn't express my annoyance, I was most certainly inwardly annoyed at that part of the course and in fact it was the main part of the course which really got to me. I really got the feeling that they

shouldn't have been making that stress. As far as I'm concerned that is never going to be the trend.

Mr. T. made a number of references, emphasised by intonation rather than clearly identifiable on a transcript, to the fact that he was uneasy about the trainers effectively 'furthering the cause' of Conservative legislation. It seemed that he felt that the training was influenced by political dogma, but nearly all other interviewed governors failed to mention legislation directly or indirectly. The one oblique reference was by Mr. P. who referred to the: "Baker renaissance or revolution or decline - call it what you will." The rest of his interview concentrated on the practical issues of governing schools and the management training required for this and so there is little to be concluded from his Baker reference.

The results of the Questionnaire presented in Chapter Four found very little evidence of political control or ownership of the management training programme by Members. While there was a slightly lower significance given to Labour controlled Authority Members in identifying management training needs, the analysis of Authority 'culture' (i.e. multi-ethnic and equal opportunities training) suggested a marginally higher significance given to these training needs in Labour controlled Authorities. The evidence is inconclusive, therefore.

The Questionnaire was not designed to concentrate on Members and political ownership: it was a much wider survey. It is not surprising, therefore, if some evidence was missed. So, for example in Newham, Haigh explained that:

Unsurprisingly, perhaps, Newham's programme is strong on equal opportunity and special needs. Equal opportunity runs throughout the training, and a module on "pupils with disabilities" deals with special needs provision and with the borough's integration policy.. (Haigh 1990 p24)

The Newham Questionnaire return records "High" significance to multi-ethnic and equal opportunities training (Questionnaire Page 3). "High" significance is recorded for gifted and special needs provision, but the return was one of the few where an amendment was made: "Gifted and" was crossed out.

In Newham the importance placed on the Authority culture-orientated training could not be entirely detected by the Questionnaire, and clearly there may be other Authorities like Newham. If this is the case then Members may be a more important influencing factor in the force field analysis than Questionnaire evidence suggests. This research, however, must record and comment on data gathered, acknowledging there may be more powerful influences on the training process than have been detected from the data analysis.

Traditionally Members have had an influence on education processes. As Brooksbank observed:

It needs to be emphasised that LEAs must, through their nominations, have a strong position on governing bodies, and however persuasive the claims of parents, teachers and community for places, those claims should not diminish to insignificance the role of those who are democratically elected to take responsibility for the education service. The Education officer must weigh up the merits of the proposals and the financial, as well as political, practicalities and investigate alternative ways of satisfying needs. (Brooksbank 1980 p212)

It is reasonable to anticipate that traditional influences

may remain and therefore Members may, as suggested above, continue to affect the training programme design and implementation.

Evidence for this traditional influence came from the Socialist Education Association:

The LEA will need to brief chairs of governing bodies probably once a term and the Labour party or the SEA should call Labour governors together at the beginning of each term for discussion on the issues coming up. Obviously the education committee members should attend. In that way, a partnership between the LEA and governors will begin to be made. (Socialist Education Association 1989 p12)

Issues which come up each term would include governor training courses offered, and therefore the potential link between Members and the influence on, or control of, management training is established. Indeed, HMI observed that there was evidence of Members' influence, in this case resulting in Authority Officers not being part of the management training process. HMI reported:

In another (LEA), where the LEA felt that officer-led training provision would have proved unacceptable to elected representatives and governors alike, the Workers' Education Association had been contracted to provide the LEA's governor induction programme. (HMI 1989 p4)

Much would depend on the culture of the Authority, and it was more the exception that an Authority would feel that its Officers should not be involved in training. Many Authorities effected a productive partnership with Members, and Lea reported that in Lancashire:

The empirically evolved programme has produced its own theoretical base. Every development drew upon the advice and help of Education Committee members, Advisers, Senior Education Officers, headteachers, experienced adult education tutors and governors themselves. This willing co-

operation had to be harnessed. (Lea 1990 p8)

In contrast to this, in South Glamorgan Mr. J. noted political influence which was not part of a productive partnership. Mr. J. said:

You can see personalities creeping in, you can see by far the biggest influence is political influence within the governing bodies. You can see in-fighting, not for the children, but it's asserting the power of where influence can be made, which Party can you serve best. It was at that point that I said, "This is not what I'm here for". It was at that point that I had to argue on an appointment purely on racial grounds. We were looking for a co-opted member, and from what I saw we should be identifying the area which needed co-option, not co-opting the person because of their race. It was purely political.

If politics is thus manifest in the workings of a governing body (though this was not observed or commented on by other interviewed governors) it is possible that politics will enter the ownership or control of the management training process. However the author has noted a counter-current. In South Glamorgan (and commented on unofficially at meetings with Officers in other Authorities) headteachers have observed that the traditional power of Members on governing bodies has been reduced and this has resulted in an absenteeism from governing body meetings. It has also been noticed that some Members have signed up for a course of management training but have attended only two or three of the six module course. This may be further evidence of the reduction in Members' influence on educational management.

In summary, it appears that the influence of Members (and Party politics) on governing bodies, and the management training that these bodies require, varies considerably; in some Authorities Members are clearly part of the force

field 'equation'.

Questionnaire responses showed in Chapter Four that most Authorities had undertaken a considerable sharing exercise in either talking to governors, headteachers and senior staff, or had sent them questionnaires to determine their management training needs. This corrects, or at least clarifies the impression given by HMI which stated that:

In most authorities the basic content of governor training courses was determined by an LEA officer or the governor training co-ordinator, occasionally in consultation with a specifically formed steering group or an INSET advisory committee. (HMI 1989 p8)

While Brooksbank in Chapter Two had spoken of the need for Authority professional judgement to preserve ownership, and Taylor had outlined Authority-led training, the NFER survey supported the Questionnaire evidence for client-orientated approaches to training programme strategy and development. If Authorities changed their approach, thus, a balance would need to be struck if effective sharing of ownership was to be made possible. HMI observed that:

Governor trainers have the difficult task of maintaining a delicate balance between providing expert information and accurate advice while also remaining impartial and avoiding personal interpretations. In the majority of cases, trainers achieved this balance and no attempt was made to influence governors where issues of judgement related to a particular institution were involved. (HMI 1989 p10)

It is not easy to assess whether the Authorities were successful in sharing ownership; the evidence of the statistical data indicates very positive efforts to do so. Of the interviewed governors, Mr. L. indicated that there was a transfer of power which he was aware management training would support. He said:

The old type of governing body was superfluous, it was ideally the head who ran the school through the County. The board of governors was a token. It was because of the new set-up that I was pleased to be asked to be a governor (i.e. he would receive management training to effect the new set-up.)

Mr. J. was more suspicious of LEA intentions, however. He warned:

We should be made more aware of what's happening within the County at the present time. I feel there are areas where we're not being given all the information...we're not being given the full response of what happened before...we will always feel as if we've been fobbed off with incorrect information. You are given the information that it is wanted you to receive, not necessarily the truth...that's all you need to know.

Mr. J. has already been identified as sensitive about political influence and therefore he may be a more critical governor. However, because of his professional position, the author is conscious of the frustrations expressed by several governing bodies about the lack of accurate information that the Authority has about individual schools. It may be the case, therefore, that Authorities are perceived by some governors (and possibly by some headteachers and senior staff) as retaining control over the management training process by withholding the information that will enable governors to manage effectively. If this perception is so, then 'sharing' is not matched by practice.

The situation is exacerbated if the LEA has more than one 'unit' delivering training. As Edwards commented:

There are examples of LEAs where the existence of specific grants has led to separate units which hardly communicate with each other. General governor training is carried out by one unit, LMS training by another, information systems training by a third, and training for the national curriculum by a separate team of inspectors and advisers. (Edwards 1990 p32)

Clearly such a situation could lead to suspicion and confusion if the Authority appeared to be giving inconsistent 'messages' from individual training units. Edwards' comment about inspectors and advisers is taken up again in Section Two of this Chapter.

The most significant aspect of school life, effectively the 'raison d'être' of the school, is the delivery of the National Curriculum. Control or influence over the training in this area is predictably of concern to all professional educators i.e. teachers, Advisers and Officers. Questionnaire results revealed that there were differing views on the content of the management training modules as far as the National Curriculum is concerned. These differences were discussed by Mahoney in Leicestershire where he observed that:

Additionally, some teachers have, understandably, expressed their concerns over introducing governors to topics such as curriculum issues....But the general feeling is that the 'untrained' governor can be more of a liability to a school than one who has participated in some training. This point of view is supported strongly by those headteacher and teachers governors who have attended our courses. (Mahoney 1988 p7)

The Questionnaire global analysis showed that Authorities perceived the need for separate National Curriculum training. Compared with Officers, a slightly higher percentage of Advisers saw separate training to be the right strategy. Authority questionnaires and verbal requests from governors as a data source showed a slightly lower percentage requesting separate training.

None of the in-depth interviews exposed any sensitivities about National Curriculum training. Governors acknowledged

the enormity and complexity of the task in trying to understand the National Curriculum, but issues of being trained separately or together with teachers did not arise.

The conclusion to be drawn is that from the Authority perspective of Officers and Advisers, teacher-orientated curricular training should continue, with governors given separate training so that they are aware of the teachers' responsibilities in the classroom. The governors have not expressed disagreement as this is arguably the one area of management where there is a clear division between 'strategic management' issues and specifically 'operational education' issues. This division may disappear as all managers become more familiar with the National Curriculum in practice.

The final group who might wish to influence management training, and might wish to ensure the right balance of management responsibilities is struck, is that of the wider community. Burgess and Sofer (1978), referred to in Chapter Two, discussed the link between school and community. Sayer and Williams took this idea further:

There is a developing view that training programmes for heads and their colleagues in preparation for the onset of local financial management in schools, a significant but relatively straightforward technical exercise, may mask the more difficult and important requirements for attitudinal change and the enhancement of personal skills required in the inevitable development of new, direct, close personal relationships with governing bodies and community agencies as part of the requirement to establish conduct and sustain external relations on an unprecedented scale. (Sayer and Williams 1989 p27)

The Questionnaire data supports this view of management training programmes not focusing on external relations,

responses showing relatively low significance given to communication skills, and very little importance placed on interaction with Other Governing Bodies, Commerce and Industry. Governing Body /LEA /Central Government Relationships are perceived to be more significant, but the author has learned of no management training modules designed specifically for this relationship building. The relationship is effectively fostered by the fact that generally it is the Authority that is providing the management training and thereby continuing the long-standing relationship. But these are modules designed for a range of other skills and not specifically communication or relationships.

Sayer and Williams see a need for a balanced contribution from all participants who might wish to influence schools unduly. They stated:

To reduce the damaging effects of those who wish to 'control' schools at local level, an action plan for the integrated training of teachers, governors and other members of communities is required. Under new patterns of training....the objectives of securing co-operative shared, differential functions for the governance and well-being of school in their communities will be understood, accepted and practised by all participants, who will recognise the legitimacy of each other's role and contribution. (Sayer and Williams 1989 p162)

In summary, there is evidence during the first and second phase of management training in some Authorities, evidence supported by comments from writers, that there is some concern over ownership of management training and control over governing bodies. Chapter Six will suggest ways of reducing this concern.

SECTION TWO. OFFICERS AND ADVISERS IN THE MANAGEMENT TRAINING PROCESS.

This Section looks at the role of Officers and Advisers within the Authority management training strategy as part of the ownership or influence force field analysis.

Advisers have traditionally provided much of the in-service curriculum training for teaching staff within most Authorities and, as Edwards pointed out in Section One, continue to deliver National Curriculum training for governors. In many Authorities their relationship with Officers in the past tended not to require them to work in close co-operation: each group had discrete tasks to perform. However, Officers may well be appointed to run governor training. Pryke (1989 pB4) observed: "Education authority officers are, in the majority of cases, taking up the job." As Officers are taking up a new or extended training role this Section will look briefly at the theme of Officers and Advisers in the overall management training context.

The Questionnaire results show Officers and Advisers have differing perceptions over the management training needs of headteachers and governors in the two areas, the National Curriculum and Finance and Budgets, chosen for in-depth analysis. The discussion in Chapter Four focused on whether there should be joint training or separate training, as did Section One of this Chapter in the context of ownership issues. The perception of management training needs was found to be sufficiently different to require a change of strategy in designing and implementing training programmes

if, as Cooper and Shute suggested:

The key group in the training process is the senior LEA and school staff themselves, the heads, deputy heads, inspectors, advisers and officers. (Cooper and Shute 1988 p58)

It is desirable that a key group has shared perspectives and similar management training objectives, and have as many opportunities as possible to work closely together in designing and implementing management training programmes in order that sharing may occur.

The differing management training perceptions of Officers and Advisers do not necessarily indicate dissimilar management training objectives, but may indicate alternative means of achieving them. Differences may also indicate the problem of role identification experienced by many professionals during a time of relatively rapid change. If roles are being forced to change rather than being allowed to evolve naturally the culture of the personnel involved may produce a defensive response in holding on to the traditional areas of responsibility. The problem of Officer and Adviser roles in management training is summarised by Kogan et al, observing that:

If all of these (governors' roles) are regarded as serious tasks in which governors require help and education, it surely rests with the heads, and to some extent as well advisers and administrators, to educate governors to the full potential.....It is not clear from studies how far advisers regard governing bodies to be part of the educational system which they should advise. (Kogan et al 1984 p170)

In South Glamorgan, Officers and Advisers are required to 'serve' meetings of governing bodies of secondary schools: they attend and respond to any specific questions asked of them in their professional capacity. (This attendance may

provide a limited 'training' experience for governing bodies.) Officers and Advisers thereby may become more conscious of the new management training requirements revealed by any of the inadequacies expressed by governors, either through the questions addressed to them at the meetings, or by observing the difficulties the governing body experienced in reaching management decisions.

However, to ration their evening commitments, Officers and Advisers in South Glamorgan rarely serve the same governing body together and therefore only rarely share their perception of the management training needs that have emerged. The appointment of an Authority governor training co-ordinator will enhance the opportunities for sharing, using the experiences of Officers and Advisers to contribute to the management training programme being designed. Some Officers and an Adviser contribute to the governor training advisory panel also, but the right balance of ownership of the management training within the new 'service culture' will remain difficult to strike. These arrangements will provide a greater chance of Officer and Adviser involvement in management training, and a greater sense of shared ownership.

In some Authorities the culture of Advisers, traditionally dealing with 'academic' curricular issues and school teaching staff, will require time to change, though the author has observed that in some Authorities there are positive steps being taken to integrate Officer and Adviser professional development. For example, the author is a member of the Wales Officer and Adviser Development group

and it is evident that some Welsh Authorities have moved towards joint professional development projects. A development officer has been appointed to facilitate these projects in Welsh Authorities.

Where traditional attitudes about Adviser/Officer demarcation prevail, however, the Authority culture may take several years to change. And, because of their traditional role within some Authorities, the service culture which Authorities may have to adopt to serve schools in the future may be more difficult for some Advisers to accept. The tradition model is of Advisers providing the lead in curricular developments, designing for teaching staff curricular training programmes which cascaded what the Advisers felt schools needed. This was an Adviser-led provision rather than a service response to that which schools necessarily requested. For the future the more traditional Advisers may need to adapt to become more 'client-orientated'. It will be important to reassure Advisers that their professional expertise is not being threatened by these cultural changes.

This Section highlights the problem of Officer and Adviser role clarification that some Authorities may have to address if the strengths and experiences of both groups is to be used to the full to contribute to management training. A division of labour is not excluded (for example Advisers developing National Curriculum modules) if a more effective and integrated team of Officers and Advisers is established. Cultural changes may be necessary for this team approach to be acceptable to both groups: there should be no role

conflict over ownership of management training in this team. And, where roles of governor training co-ordinator have been split between, for example, Officer and head, or Adviser and WEA tutor, as HMI observed:

These joint appointments appeared to work well, not surprisingly, since no one person is likely to have all the skills and knowledge required to undertake such a complex task. (HMI 1989 p5)

It would seem to be imperative that an Authority was seen to be practising good resource management in terms of its Officer and Adviser personnel, and strong teams or joint appointments to support schools would be a manifestation of this good practice. More fundamental questions have to be asked however:

1. Is this revised but traditional Authority-as-provider model relevant for management development in the 1990s?
2. Could not Authority consortia act as training agencies to provide directly, or arrange the provision of training, as required by the schools as clients?

Chapter Six will make recommendations about the best use of Authority expertise and broader Authority roles for the future.

SECTION THREE. AN EVALUATION OF THE MANAGEMENT TRAINING PROGRAMMES DELIVERED.

The content of the management training modules was remarkably consistent, the Questionnaire results clearly identifying six high priority training areas: "1986 and 1988 Act Details; National Curriculum; Finance and Budgeting; Legal Responsibilities; Staff Selection; Role of Governors". Several of these areas had been anticipated in Chapter Two, discussing the details of Cambridgeshire, Solihull and Norfolk management training. The training manual material surveyed in Chapter Two also indicated that these areas would be a feature of most introductory training courses. Finance was a high priority module and this will be looked at as a separate issue in Section Four. The five other modules in the 'core' were identified by the South Glamorgan governor training advisory panel in early discussions and consultations about management training content. National and local meetings between various Authority Officers similarly came up with a broad consensus along the same lines. (Table 1 presented a more complex pattern of management training need, to be commented on in Chapter Six.)

This Section evaluates the training programmes for:

1. CONTENT

Supporting the Questionnaire and NFER survey results, HMI reported that:

The majority of LEAs had concentrated on establishing 'basic' governor training programmes. These often consisted of area-based introductory courses for new governors and seminars covering specialist topics for more experienced governors. Several Authorities had developed longer-term

strategies for governor training but the majority had few plans beyond their three year ESG funded programme. Many LEAs found they had underestimated the extent of training required and therefore the funding to be allocated to it. (HMI 1989 p5)

In those LEAs which provide it, post-induction training was generally delivered through a series of seminars rather than sequential course sessions. These half-day or full-day seminars usually addressed three major areas of governors' responsibilities: finance, staffing and the curriculum....Other topics offered as part of this second-level training programme included: chairing meetings; equal opportunities; health education; religious education and assessment and testing. (HMI 1989 p9)

The Questionnaire had not attempted to differentiate between the seminar or sequential course sessions approach commented on by HMI. The in-depth South Glamorgan governor interview comments were expected to reveal their perceptions and preferences for management training methodologies. The three major areas noted above by HMI were also those of concern for South Glamorgan governors, as monitored after their training and outlined in Chapter Four. Of the thirteen governors interviewed, all mentioned finance and budgeting, and twelve mentioned staffing as areas where they felt they needed to know much more; nine felt overwhelmed by the National Curriculum. H.P.'s comments were fairly typical; she said:

The National Curriculum is confusing enough for them (teachers), it's even more confusing for us governors, and it must be totally bewildering for the vast majority of parents. The National Curriculum video was rubbish, and I said so at the time.

2. MATERIALS

None of the thirteen governors interviewed felt that the Authority had included any broadly irrelevant modules though parts of some of the modules, in particular the governing

body meetings module, were criticised. Though the governors could see the need for additional modules, their main concern was for more in-depth training in the modules considered central to their management responsibilities, as indicated in Chapter Four.

The evidence from the Questionnaire indicated that Authorities were relying heavily on their own materials for delivering training. Baker identified one of the main problems of alternative materials. He noted:

This (link governors to take on some training), however, would raise the problem of the unsuitability of most commercially available training packages. Two of the authorities had bought CIPFA materials but had abandoned them because they were "too jargonised, too expensive and unexciting". (Baker 1990 p50)

The author of this study has commented earlier on his abandoning commercially produced materials, and on the poor quality of much of the manual training material. Roberts and Baker (1988 p9) commented that: "Responding Authorities used the training materials of agencies, notably the Open University pack." However Authorities were only using these additional resources selectively and for introductory management training rather than for in-depth training.

The problem of the time taken in producing and piloting suitable management training materials may well have contributed to the sense of Authorities having failed to deliver the quality of training they would wish to deliver. Although the consistency of the content of the Authority core modules for introductory management training might indicate a consensus on the training strategy developing, Authorities were not in fact content with the start that had

been made in implementing training programmes. Roberts and

Baker commented:

73 LEAs (84%) felt that their present training was not adequate in relation to the numbers of governors trained and the topic areas covered. Even amongst the authorities expressing general satisfaction with the present provision, eight LEAs were reviewing their programmes or expressed some doubt about them. (Roberts and Baker 1988 p9)

This significant feeling of inadequacy is one of the main reasons for arguing the importance of this research project, and so that appropriate recommendations for future management training can be made in Chapter Six. Inadequacy, whether because of poor materials or the complexity of the levels of training, was not reduced by the fact that many of the tutors were, in South Glamorgan at least, delivering training in addition to their full-time professional jobs. Support and guidance for them was not easy to provide.

3. MIXED ABILITY GROUPS

One problem encountered by governor trainers was that of the appropriate 'level' of training to be provided and in effect even the introductory courses were 'mixed ability'. The mixture of ability could include teachers and governors and could cover the differences between various governor categories. As was discussed in Chapter Two and Chapter Four, and as has been re-examined in this Chapter, there has been a mixed response to the strategy of training governors and headteachers together. The Norfolk headteachers' survey suggested separate training, with the headteachers benefiting from training that was part of practice rather than something which was delivered out of context. Coopers and Lybrand, Avon and South Glamorgan, for example, stressed the need for joint training which, unless this could be

arranged during the normal school day, would effectively be out of context, certainly so for the National Curriculum module.

The diversity of approaches and attendant problems was observed by Edwards who detected the benefits rather than the disbenefits of mixed ability groupings or levels of training. He said:

A general experience among LEAs is that separate conferences and courses across the authority, or part of it, for particular categories of people - governors, heads, deputies, school bursars - are sometimes counter-productive. The clients are a single interest group and often try to make common cause against the LEA or indulge in unconstructive posturing about their new responsibilities. (Edwards 1990 p32)

The headteachers are perhaps traditionally seen as a special group to be trained and Baker commented:

Both these authorities (a London Borough and a County) tended to deal separately with the training of heads, although the shire county was setting up courses where headteachers were invited to bring two or three governors with them. By contrast, in the other London borough, heads were encouraged to bring a group. The team approach overcame the difficulty that some LEAs faced of a lack of co-ordination in the training offered to various groups. (Baker 1990 p50)

The NFER survey supported the argument for mixed ability groups and Roberts and Baker noted that:

Most LEAs ran courses for governors, full stop. No differentiation was made between new and experienced governors nor was there a distinction between teachers, LEA, parent governors etc. It could be argued that cross-fertilisation is a good thing for all concerned. (Roberts and Baker 1988 p19)

But this is further complicated by a preponderance, observed by Morley-Jones, of primary governors:

It would appear that governors with relatively little experience i.e. two years or less, are more inclined to enrol on courses and by far the

majority will represent schools in the primary sector. (Morley-Jones 1989 p33)

When delivering management training himself, or when monitoring management training by observing other tutors delivering training, the author has been aware of tensions between Primary and Secondary sector governors. For example in cases where management training tackled the practicalities of National Curriculum levels of attainment, or tasks focused on issues which highlighted the comparative Primary and Secondary resources involved in finance and budget modules, tutors have been required to provide additional explanatory comments separately for governors of each sector. So too has an imbalance between Primary and Secondary governors occasionally caused difficulty during group work activities in these modules. While most governors accepted that the activities are designed to explore management principles, "unrealistic" figures have caused frustration in some cases.

These are not necessarily universal experiences of difficulty however, and they tend to reflect the inflexible attitudes of a few governors or the lack of tutors' experience and expertise in making the right comments about the training principles being employed at the most appropriate moment during the management training.

In South Glamorgan, where Primary 'feeder school' governors were being trained with the relevant Secondary school governors these occasional tensions were far less noticeable, and indeed the mixture was often beneficial, as HMI detected in a broader training context. HMI observed:

The majority of participants felt that having governors from different schools and phases attending the same course was beneficial because of the diverse experiences and ideas that could be exchanged. A few would have preferred a course which was aimed at their particular phase and level of experience. (HMI 1989 p7)

The tutors' perceptions of mixed ability groups could perhaps help to explain an inappropriate delivery, as HMI noted:

In a few cases, tutors appeared to have low expectations of governors' knowledge and understanding of professional issues... Such low expectations were generally misplaced since many governors demonstrated a sharp grasp of the issues and an informed concern about their rights and responsibilities. (HMI 1989 p11)

Low expectation by tutors is understandable if tutors have experienced training sessions with a preponderance of governors new to educational management. One of the crucial problems of mixed ability groups is faced by a tutor having to pitch the level of management training to satisfy all participants. With groups which may change their composition from week to week because of non-attendance (or by sending 'substitutes' which keep numbers up but create new problems for tutors in maintaining continuity between modules), tutors find it very difficult to discover the pitch for the average duration of the six introductory management training modules. For more in-depth management training it is reasonable for the tutors to expect a level of knowledge and understanding of current management issues; in this case they may have relatively high expectations.

Of the governors in South Glamorgan interviewed, a majority identified the problems of mixed ability grouping. For example, discussing the materials used, Mr. T. said:

As a governor of two years' experience they (the tutors) were giving materials for someone who hadn't any experience of being a governor at all. I realise that this is an absolutely new situation.

In fact, other than where resignations and new elections or co-options have taken place, all governors were elected or nominated at the same time so that all governors at Mr. T.'s training sessions should have had the same minimum of two years' experience.

Father L. made a general comment about 'levels of governors' when he observed:

A spread of levels, thinking that many parent governors are not going to be at the same level of interest or educational background as some of the other governors.

Talking specifically about legal responsibilities training (a 'quiz game' approach), Father L. said:

The way it was played was rather intimidating and could be rather off-putting. I played it with people who were very knowledgeable in the education field and even some of these people found it quite a hard task. However, I can see in retrospect the value of that, even if only by exposing our ignorance.

4. VENUE AND TIMING

The Questionnaire results showed a very mixed pattern of delivery strategies 'geographically' within each Authority. Governors interviewed in South Glamorgan expressed general satisfaction over the range of venues and times offered for training. However Mr. P. was critical of the accommodation: "My dream is an adult education centre in every town where you sit in armchairs, and so on. When you're reduced to classroom accommodation....!"

Mr. P's concerns about accommodation were echoed by HMI,

observing that:

Training mostly took place at teachers' centres, local government buildings, on school premises or in adult centres. Overall the accommodation was satisfactory with movable furniture and reasonable access to audio-visual equipment. Teachers' centres offering good quality equipment and comfortable surroundings generally provided the best training venues. (HMI 1989 p8)

The suitability of accommodation has not emerged as a major area of concern to governor training co-ordinators, but clearly the rapid expansion of training has outstripped the availability of venues (and particularly the number of teachers' centres and adult education centres available). Accommodation suitability is itself a contributory factor to be borne in mind when considering the important theme of training delivery style which will be considered in Section Five.

In summary, Section Three has detected a dissatisfaction with the content of the management training and the venues for delivery; dissatisfaction was exacerbated by having to attempt to provide different levels of training to respond to a rapidly expanding demand. The recommendations in Chapter Six will need to address these issues, but first Section Four will look at finance and budget management training separately, this being the area where there has been considerable national and Authority comment, and fear expressed.

SECTION FOUR. FINANCE AND BUDGET MANAGEMENT TRAINING.

Finance and budget management training touched on new areas of responsibility which presented a major cultural change to the school management process. In their Schemes Authorities were required to devise formulae which were, "simple, clear and predictable". The consultation process which preceded Scheme submission focused on pupil numbers and other factors used to generate the formulae. This being so, school governors, headteachers and senior staff became conscious of the importance of understanding the formulae and recognised that finance management training would be a priority.

The training required to explain formulae presented a considerable challenge. In South Glamorgan the objective of introductory finance and budget training was to give managers confidence in understanding the Scheme and begin to identify, and then make the appropriate decisions to resource, their school's educational priorities. The Authority recognised that subsequent in-depth training would be necessary to develop and hone the skills of making educationally-driven rather than financially-driven choices.

Much of the introductory training delivered in South Glamorgan (i.e. training covered by this study) was before the Authority Scheme had been approved. The Authority formula budget and individual school budgets had not been produced therefore. After the introductory training, all of the thirteen governors interviewed expressed some reservation about their new responsibilities and their fear that education decisions might not be educationally-driven but would be determined largely by available financial

resources. Few observed any of the potential benefits that Local Management of Schools should bring, such as the flexibility to resource school priorities rather than Authority priorities.

Governors' concerns were summed up by H.P. who commented: "I've a horrible feeling that decisions are going to be finance-driven." This was a typical sentiment of a number of interviewed governors and all felt that they wanted further management training to get finance and education into the appropriate context outlined by Levacic in Chapter One. The consensus of interviewed governors was that the introductory finance and budget module only touched the surface of the topic. H.P. commented:

Perhaps not for me personally (i.e. in-depth training) because we've appointed a sub-committee to deal with the budget, but I guess that's a very important area, and it's really quite alarming and frightening I think, and I think anybody that's involved with that really will require a lot more training, a lot more training.

One of the major problems encountered by governors, commented on by the interviewed governors, was that of understanding the exact nature and extent of their responsibilities. This problem was similarly observed by HMI where they reported:

In some authorities, training for Local Management of Schools (LMS) was being developed separately from the general governor training. Liaison between the different providers was often tenuous and as a result some governors were unclear about the purposes of both programmes. In one Authority governors complained that a lack of co-ordination between the two providers had resulted in 'mixed messages' concerning their roles and responsibilities regarding financial delegation. (HMI 1989 p6)

In South Glamorgan it was not always the case that governors

from a single governing body received management training at the same time or at the same venue, and therefore not necessarily from the same tutor. Subtle differences of emphasis by the tutors, and the subsequent reflection and interpretation of the content and "messages" of a management training session, could lead to a confused situation when governors came together again after training to put into practice their newly acquired skills and knowledge.

As had been predicted by Taylor and commented on by Knight in Chapter Two, and certainly as a feature of the author's experience, the major management training problem was that few tutors have the detailed expert knowledge about the general framework of finance and budgeting, and in particular formula funding, to deliver the introductory management training required by governors. Formula funding is one significant area which concerns governors for they need to feel confident that their school budget share is an equitable distribution of available resources. Once this is understood, during subsequent in-depth training they can begin to consider how best to allocate budget headings to support the delivery of education. None of the training manuals analysed in Chapter Four were able to go into the sort of formula funding detail that governors wanted. This was partly because formulae had not been fully developed by the time of manual publication, but it was also because each Authority was able to devise its own unique formulae which inevitably a training manual would not be able to anticipate. Tutors were therefore faced with the task of designing their finance and budget management training

module based on their Authority Scheme with very limited help from the published training manual material.

To complicate further the management training situation, finance and budgeting was in many ways the most contentious area of the six core modules. All Secondary and Primary schools (in Wales all Secondary schools and Primary schools of over 300 pupils) were having to move towards average funding and therefore approximately half were likely to be 'losers', as was discussed briefly in Chapter One. Tutors were thus faced with the task of having to justify the formulae to governors of schools where the equity of the formula was bound to be in question. Governors of schools that were gainers under the formula tended to keep quiet, or complained of the years of under-resourcing before formula funding was introduced. Depending on the overall balance of participants as gainers or losers, the atmosphere of training sessions could be quite emotionally charged if losers out-numbered gainers.

The author's professional position demands that he has a thorough knowledge of South Glamorgan's formula. He has to deliver introductory, and develop in-depth, finance and budget management training programmes. He has found it difficult to persuade governors of the equity of parts of the South Glamorgan formula and he can understand the governors' and headteachers' unwillingness to accept the equity of average resourcing in order to satisfy the constraints of pupil-driven formulae. The author has noted that training sessions are made more difficult where governors at losing schools argue that there should be no

losers in education, irrespective of past inequality which an average formula should rectify. Effective learning is made more difficult in a highly charged emotional atmosphere.

While the author can claim to have the expert knowledge doubted by Taylor, it is virtually impossible to provide other tutors with the depth of understanding that is needed to handle some of the more perceptive questions that governors ask. The author deals with these issues as part of his professional daily routines of the Authority. In contrast tutors deliver on average one introductory finance and budget training module every six months and are inevitably out of touch with current issues.

There are two other factors which make introductory finance and budget management training particularly difficult. Firstly, some governors do not accept the philosophy of formula funding because of their political or broad educational beliefs. Whether the formula is equitable or not they are likely to be critical during management training sessions and tensions are likely to spoil the relaxed, mutually-supportive atmosphere that tutors attempt to create.

Secondly, where Authorities have decided to phase in full delegated responsibility there may be a mixture of governors at a management training session, some with full delegated responsibility while others are still waiting for full delegated responsibility. Other governors, in schools of less than two hundred pupils, may never receive full

delegated responsibility. This mixture of governor responsibility in itself adds to the problems of the levels of management training discussed in the previous Section. It also tends to lead to tension when the advantages of Local Management are outlined by the tutors, these advantages accruing to those schools with full delegation while those still waiting delegation perceive themselves to be currently "missing out". These issues make the task of finance and budget training difficult and in some instances potentially acrimonious.

Finance and budgeting is one of the more intractable problems of introductory management training. But, as schools become accustomed to receiving annual and monthly budget statements, in-depth management training will help governors to concentrate on the decision-making process to support the delivery of the National Curriculum rather than formulae details. In that a small percentage of schools are currently carrying out their fully delegated management responsibilities without regular major budget management crises, it is probably the case that those Authorities have managed to provide sufficient management training and support to persuade governors that they can manage. Until the results or outturn of a full formula-funded financial year are analysed, however, this is conjecture and future in-depth management training may have to tackle the issues which have emerged from the analysis. Chapter Six recommendations will refer to finance and budget management training in this context.

SECTION FIVE. STYLES OF MANAGEMENT TRAINING DELIVERY.

Whether the ownership, content, delivery location, grouping of participants or level of management training, and the adequacy of finance and budget management training are successful will depend significantly upon the style of delivery of the management training programme. If the content of training is relevant but the delivery is 'wrong' the governors and headteachers will not receive the full benefit. This Section will investigate the considerable amount of comment about style of management training that has arisen from a number of sources.

Though an issue not specifically surveyed by the Questionnaire, the author is aware that several Authorities have developed experiential, participatory training styles suitable for adults. This has certainly been the aim of the governor training advisory panel and the tutors writing the management training modules in South Glamorgan. Unfortunately the amount of preparation, advice and support that Authorities were able to give tutors in terms of adult education methodology was generally assessed by HMI as being inadequate. HMI noted:

In only one case did the LEA provide, through the LEA Adult Education Service, specific information or advice on training methods and appropriate styles of delivery. This emphasis on content was often reflected in a narrowly didactic style of teaching. In some cases, there was considerable scope for improvement to achieve more active and participatory methods of teaching adults. (HMI 1989 p9)

In their report HMI commented at length on the delivery style and preparation for tutors to teach adults. As HMI comments are central to the discussion of adult education in

this Section and the recommendations to be made in Chapter Six, the full content of the relevant section of their report is quoted. HMI observed:

Those conducting governor training mostly came from one of two backgrounds: they were either LEA officers or teachers with considerable experience of working in education but often with little, if any, experience of teaching adults, or they were adult educators who had taught adults but who may never have taught in schools or have recent experience of doing so.

In the majority of cases neither the organisers nor the trainers had received any specific training themselves. Where training had been provided, it was fairly minimal and concentrated on the requirements of the 1988 Education Act rather than exploring how adults learn and what training approaches might be appropriate. Many of the trainers expressed a desire for further training, particularly in relation to training techniques such as group work and role play.

The most effective trainers had not only come from adult education but, most significantly, had either recently taught in schools or were in close contact with local schools, often as a parent governor. Their experience of training adults enabled them to establish informal and supportive groups where governors were encouraged to contribute their own experiences and share their concerns. Less flexible or less experienced trainers often allowed the content of their sessions to take precedence over the learning process thus leaving many course members feeling frustrated and sometimes confused. (HMI 1989 p12)

The Authorities face a significant logistical problem of training a sufficient number of tutors with appropriate skills of training adults to reach a large body of governors, headteachers and senior staff with an appropriate training methodology. However, the strength of HMI criticism is such that Authorities would be ill-advised to ignore it.

Experiential learning had been advocated earlier by Sallis, Knight and Norfolk County Council discussion documents in Chapter Two and so there was advice available for those

designing management training programmes, providing that they had read the relevant documents and papers. The NFER survey noted nevertheless how few Authorities had apparently embraced the methodology of good adult education delivery. Roberts and Baker noted:

Many of those programmes appeared to be in lecture form with question and answer sessions at the end. Judging by the materials supplied, few LEAs seem yet to have developed more participative methods of learning, although there were some examples of simulation exercises, workshops, case studies and role play. (Roberts and Baker 1988 p18)

Roberts and Baker commented that the survey had gathered insufficient detail to state exactly what management training styles were being used, and suspected that some Authorities were planning to use more participative methods in future training programmes.

However the debate over delivery style being ideally participative is not one-sided. As noted in Chapter Two, Taylor had talked about handbooks, and Kogan had advocated a greater reliance on reading information. Indeed, HMI said that:

The content of most governor training sessions was relevant to governors' needs although trainers were often over-ambitious in what they planned to cover. In several sessions the tutors could have asked participants to undertake a certain amount of pre-course reading thereby covering much of the basic information presented in class. This would have increased the time available in which the practical implications of the topic could have been more fully explored. (HMI 1989 p9)

In the author's experience it is questionable whether governors would prepare for training by reading material in advance. It would also present further organisational problems for tutors if materials had to be delivered to participants before training, though this is not an

insuperable problem.

The observations of HMI are those of experienced observers of teaching and training in practice. The in-depth interviews of governors fulfilled their purpose of providing an opportunity for those receiving the management training to comment on how appropriate they felt the delivery style was in South Glamorgan. Perhaps inevitably, the comments reflected the natural disposition of the governors as individuals to training style, but also the disposition of the other governors with whom they were participating in the training. Comments also reflected the relationship of the governors interviewed and the tutors.

Mr. P. would have been willing to read preparatory material before management training and observed: "Give it to them as a booktutors should be aware of the fact that we can read....and that saves time. A home study kit would be useful."

Mr. P. was unhappy about the role playing exercises which South Glamorgan had devised to attempt to reflect the governors' meetings that he wanted. He advocated: "Make every meeting a governors' meeting. I think the role playing efforts were a little naive; they were a bit too boy scoutish. Games - you have to be so careful....some people feel embarrassed."

Mr. T. was similarly uneasy about the adult education technique of playing "games", but could see their value. He said: "We played games, ridiculous games, but nevertheless they made us realise, they planted the seed and made us

realise what we are letting ourselves in for."

Part of the philosophy and methodology of adult education is that an enjoyable, relaxed style enhances the process of training. This was stated as an objective which South Glamorgan impressed upon its tutors. Tutors apparently succeeded, as noted by Father L. when he commented: "There were times when there was perhaps too much enjoyment, but that's the group dynamic working." Similarly Mr. K. enjoyed the 'activities', observing:

Fine, the way it was delivered and the tutors were completely enthusiastic about the task. Everybody enjoyed themselves, everyone learned something, given more time we could have learned a lot more.

The enjoyment of South Glamorgan management training was monitored and the results presented in Chapter Four. The data supports the impression that governors enjoyed their management training.

Clearly the group work was generally successful, as Mrs. F. noted:

I felt my role (in the group work) was to be there representing parents; at the end of the day it must be your own point of view but you must put their (parents) views into it. I enjoyed the conflict and the difference of opinions.

Discussing the staffing module Father L. observed that it was:

One of the most interesting. A large proportion of it done on case studies, and working in groups we were asked to make appointments, as it were. I've had a certain amount of experience of recruitment, so perhaps I found it easier than some of the others (governors), but it was quite a valuable exercise, and well done.

There are two areas of adult training which can be further explored in this Section. The first is an area of differing

opinion outlined by Buckley who said:

There is an area of debate between those who believe that such an experience (of management issues such as inter-personel relationships, decision-making, negotiation, mediation, running meetings, handling and resolving conflict, leadership) can be provided in an artificial form such as role play or simulation and those who believe that such skills can only be effectively learned within the 'real' situation in which the learner is called upon to exercise them, namely the school. (Buckley 1985 p135)

This point will be picked up and explored in Chapter Six, but very few of the governors interviewed made any direct reference to their feeling that their management training being set in an artificial situation had adversely affected its effectiveness. One exception, explored above and again below, was Mr. P. who wanted training sessions to be based almost entirely on committee work, just as governors would find in the real situation.

The second issue, that of the background or training experience of the trainers themselves, did provoke some interesting comments. Buckley observed:

Trainers experience strong resistance to theoretical concepts by those who are practice-orientated... The research or 'theory-orientated' trainer may lack experience within the school system and, moreover, may not have devoted adequate time to developing practical examples drawn from the practitioners' world, which might illustrate the concepts. (Buckley 1985 p131)

Mr. P.'s comments illustrate this issue, though as a retired headteacher he was more perceptive of the training process than many of the other governors interviewed. For example he said:

Although they knew their ABC pretty well, they lacked the white heat of committee experience. They were far from it - immature in that respect. I think they failed to use the varied experience of the people there. This is something they should

exploit. There are very few careers without committees these days.

Mr. J's professional position as a further education lecturer probably enhanced his understanding of the training process more than many other governors. Mr. J. said that he wanted:

Training which is not dictatorial, and the credence of the trainer is important. He should be an independent person who had knowledge of the Authority, parents and pupils, and the school staff and could present the arguments. Theory can be put down in the classroom but there should be experiential learning. A communicator is far more important than a lecturer.

Section Five has discussed the inadequacy of adult training skill reported by HMI and has detected supporting evidence for this in comments made by interviewed South Glamorgan governors. However the general interview comments, and the monitored scores of governor management training in the Authority, would suggest that the South Glamorgan tutors had delivered a reasonably successful introductory governor training programme. There is not overwhelming evidence of the Authority having failed in its attempt to outline the main methodology of andragogy during the 'trainer training' sessions held. The Authority reinforced the methodology during the tutor de-briefing and feedback sessions which the Authority felt were important in helping to monitor and evaluate the management training programme. South Glamorgan may therefore represent those Authorities which were generally able to effect an appropriate methodology in management training programmes. The Authority has more tutor training to carry out for the future in-depth training and adult education methodology is something which it will continue to emphasise and attempt to improve.

SECTION SIX. A SUMMARY OF CHAPTER FIVE THEMES AND RECOMMENDATIONS REQUIRED IN CHAPTER SIX.

Chapter Five has identified and discussed a number of management training themes emerging from the literature, and from evidence of practice gathered from the data collection and interviews. Section One considered ownership of training, Section Two discussed the problems of Officers and Advisers in responding to the demands of the new service culture. Chapter Six will answer the question:

1. For whom is the management training really intended and who, therefore, should be the most influential partner in the management training 'equation'?

Section Three discussed the widespread Authority dissatisfaction of the management training programmes delivered so far. Authoritative bodies such as HMI were also critical of content, and of methodology. Chapter Six will answer the question:

2. How can the most appropriate management training programme be delivered to school managers?

Section Four looked at finance and budget management training. Chapter Six will answer the question:

3. Should school-specific finance and budget management training be provided, and if so, how?

Section Five tackled the fundamental issue of management training methodology. Chapter Six will answer the question:

4. What are the principles of good adult training and how should Authorities inculcate and implement these principles for the future benefit of all school governors, headteachers

and senior staff?

In answering the questions outlined above, Chapter Six will make detailed management training recommendations. These recommendations should facilitate improvements in the whole of the management training programme and thus encourage a move towards the highest quality programme. This will be relevant in South Glamorgan, but also in those Authorities similarly committed to the search for the highest quality. The recommendations will be presented as a heuristic model for any Authority staff responsible for the Authority training development strategy.

CHAPTER SIX

RECOMMENDATIONS FOR FUTURE MANAGEMENT TRAINING.

Preface: **Section One** will briefly reiterate the findings analysed in detail in Chapter Five and the questions to be answered.

Section Two will consider the concept of management 'training' used in this research.

Section Three will establish the objectives for the management development recommendations to be made in the following Sections.

In Section Two, and in Sections Three and Six, conceptual models will be presented which will help in examining the new management processes and methodologies which are being proposed.

Section Four will make recommendations about ownership of development (the first high level objective).

Section Five will make recommendations about the style of delivery of management development (the second high level objective).

Section Six will review the whole of the research study to emphasise the salient points of the first five Chapters where training needs were identified.

SECTION ONE: CHAPTER FIVE SUMMARY: OBJECTIVES TO BE MET.

Chapter Five discussed the emerging theme of ownership of the management training process. The question to be answered in this Chapter is: **For whom is the management training really intended and who, therefore, should be the most influential partner in the training equation?** As Local Management of Schools devolves responsibility, local managers become the 'client' for the Authority-delivered or Authority-arranged management training. The assumption being made in this Chapter is that the client-centred culture is acceptable to Authorities. The 'ownership model' will be the basis for the recommendations in Chapter Six with the governors, headteachers and senior staff as clients, directing the tutors.

Authorities expressed dissatisfaction about the content of their management training programmes. The question to be answered in this Chapter is: **How can the most appropriate management training programme be delivered to school managers?**

Chapter Six, in making recommendations that will enhance ownership of the management training process by establishing a more client-orientated training programme, will recommend that the content, levels of training and the practical details of the programme will pass to the clients and they will discuss with tutors their individual or group needs. These practical details and needs will include the finance and budget management training considered in Chapter Five, the question that this Chapter will address being: **Should school-specific finance and budget management training be**

provided, and if so, how?

Chapter Five looked at the theme of the style of training delivery. Influential educational writers and HMI were quite critical of tutors' capacity to deliver adult education methodologies in those Authorities surveyed. This Chapter will answer the question: **What are the principles of good adult training and how should Authorities inculcate and implement these principles for the future benefit of all school governors, headteachers and senior staff?**

Role clarification and better team relationships for Officers and Advisers were identified in Chapter Five as targets for the future. This Chapter will recommend that Officers and Advisers should be an integral and integrated part of the management training programme, professionally aware of the importance of the style of adult training delivery and the desirability of a shared perspective of adult training methodologies. The role of Officers and Advisers will be incorporated into the high level objectives i.e. a client-centred approach and an improved adult education style, as the recommendations will make clear.

Officers and Advisers are well placed to implement and support an adult education style of training because of their professional responsibilities. Recommendations about their specific roles in relation to any other tutors used by an Authority, and in the overall training strategy, will be presented.

SECTION TWO: MANAGEMENT 'TRAINING' OR MANAGEMENT 'DEVELOPMENT'?

This study has analysed and discussed the concept of 'training', training being defined in the research Preface as the modification of behaviour through experience. In Section Two it will be argued that training is not the most appropriate concept for the acquisition of management attributes for the future. In proposing a paradigm shift to management 'development' it is important to establish the parameters of the continuum of learning experiences including 'training' and 'development' so that the reasons for the shift are clearly stated.

There are many terms which are used to describe the processes whereby individuals acquire management attributes i.e. knowledge, skills and attitudes which they did not have before. Perhaps the most common term is 'experience' and this is an on-going process which will build individual management attributes almost subconsciously.

If experience is applied to the educational world of governors and headteachers, given time to accumulate sufficient experience these managers would probably be able to manage their schools without any formal or planned training programme. Dennison observed that: "They may see management as an activity in which experience is the only effective teacher." (Dennison 1989 p37) However, while gaining sufficient experience to manage, mistakes are likely to be made. In Chapter Two it was noted that in the early days of their pilot scheme for Local Management Cambridgeshire accepted that there was no alternative method

but experimentation and accumulating experience. It would, however, be irresponsible to propose that management mistakes are an inevitable and acceptable part of the process of educational management. In order to manage well and reduce mistakes to a minimum, education managers should be provided with something substantially beyond experience, although Dennison observed that in terms of improving the capacity to cope with change some headteachers and senior staff: "Doubt whether formal management training has any worthwhile contribution to make." (Dennison 1989 p37) The author argues that the changes brought by Local Management require management support and preparation. "Training" is in the title of this study and so will be considered first, before looking at other methods of acquiring management attributes.

The formal side of management training may be delivered in situations not unlike those experienced in sixth forms or further and higher education institutions. Training may also be provided as formal induction for employees on joining an organisation. The components of many formal training schemes are a syllabus which is often drawn up by those responsible for providing the training, and a timetable for delivery. Other components are the tutorial staff and the materials and teaching aids used to deliver training. The essential feature of this formal training is that the participants receive that which the providers decide is required. That is not to suggest that the training is ineffective or irrelevant, for formal training programmes are often repeated and can be refined and kept up to date.

They should make full use of the wisdom of accumulated good practice. However it is nearly always the case that the tutors can see the direction that the training is going; they have, effectively, the training 'map'. The participants are passive passengers along the route chosen for them.

This scenario reflects the introductory management training provided by many Authorities and discussed in Chapter Five, the participants receiving that which Authorities decided was required to meet short-term needs. Some Authorities, like South Glamorgan, undertook to ask governors and headteachers and others about the core modules that should be delivered. The detailed syllabus was drawn up by the tutors however, and they retained some ownership. But, as Mr. J. and Mr. T. pointed out in Chapter Five, there was criticism of the message and content of the training 'route' that the Authority's training programme designers took.

There are other methods of acquiring management attributes, some of these detected in the practices that the author has observed in South Glamorgan and have been outlined in educational journals and management texts. For example, 'coaching' is a process which is continuous. During coaching, experienced governors and headteachers acting as role models pass on advice to new governors and deputy headteachers. Coaching is a method whereby newly appointed managers in particular can model their behaviour on good practice, providing of course that they have the ability to perceive it where it exists. Rather like experience, coaching may go on subconsciously. But, if carried out by a very experienced governor, but formally and without any real

sensitivity, coaching may make an inexperienced governor feel subordinate or inferior and this will reduce the effectiveness of the coaching considerably.

However, as Holmes et al warned in the case of teaching staff, using "staff development" in a different context to that which is developed below, if coaching is effected purely by association with teacher colleagues it has limited value. They stated:

A passive approach to staff development by which staff learn solely by association with colleagues is not consistent with the view expressed in the Introduction (to the modules) that staff development is an integral part of the process of developing the school's curriculum and organisation - a systematically planned aspect of school organization. (Holmes et al 1989 p14)

Ideally formal coaching takes place when perhaps two or three managers sit down and the more experienced manager takes them through a management situation together, explaining the decisions he or she made and invites comments as the situation is unfurled. This is more likely to happen where a close relationship between headteacher and deputy headteachers has been established, and it is definitely more likely to occur in the conducive atmosphere of the headteacher's study or a similar relatively 'private' part of the school. Governors are less likely to have the same physical privacy, and are only very rarely professionally involved on a daily basis. Contact between governors is sporadic, and the opportunities for coaching are therefore limited. The establishment of governing body sub-committees may contribute to more coaching in future, however.

'Delegation' offers managers the chance to pass on relevant

experiences to subordinates. The headteacher delegating specific responsibilities to the deputy headteachers and other senior staff is a fairly obvious example. As with coaching, in governing bodies this process is beginning to emerge as sub-committees are given responsibility for making recommendations about specific education areas, as H.P. noted in Chapter Five. The chairmen of sub-committees currently tend to be relatively experienced governors, and in some governing bodies it is considered to be useful training for newly appointed or co-opted governors to be involved in areas of particular interest to them. A particularly skilful sub-committee chairman can combine the coaching and delegation approaches for the benefit of sub-committee members.

The continuum from training, through coaching to delegation reflects the increasing ownership of the learning process by the participants. To illustrate this, there is a training difference between the governors' finance sub-committee listening to an Officer explain the details of formula funding in an Authority i.e. formal training, and the sub-committee discussing the Authority formula applied to the school so that recommendations may be made to the full governing body i.e. delegation. The latter case gives participants a greater ownership of the learning process.

This Section proposes that the continuum should go one stage farther: the stage of management self-development (termed 'management development' in this study). In this case the individual takes responsibility for long-term self-development with the superior or up-line manager recognising

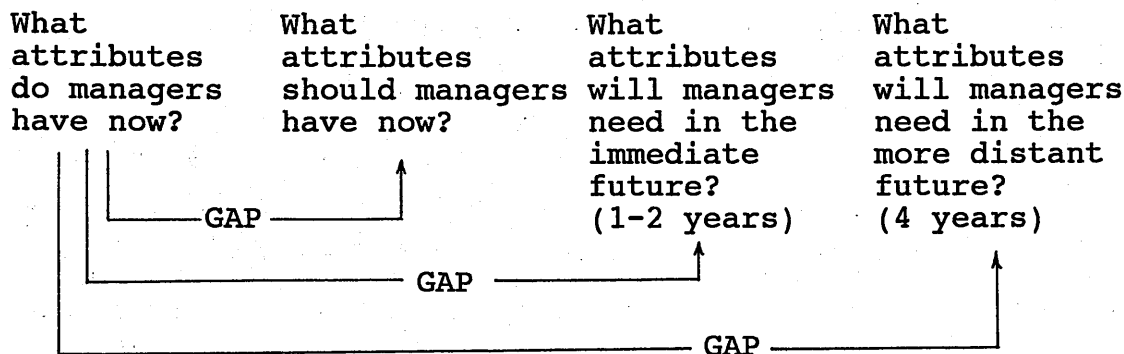
the individual's potential for development. While self-development will still have targets to achieve it is essentially a 'learning to learn' philosophy where the processes of learning are more important than the content of learning.

In terms of education management development, the tutors have no real ownership of the content of learning and act as facilitators for the processes of learning. In schools this is currently manifest in the INSET committees which work with Advisers to design the programmes which teaching staff require. For the future in governing bodies, management development would involve the governors in identifying their attribute weaknesses (whether knowledge, skills or attitudes) and proposing their own solutions as to how these might be redressed. This approach does not preclude training: it allows the participants to decide on the most appropriate methodology to meet their needs.

As the emphasis in this Section on development as 'learning to learn' is a significant paradigm shift it is worth thoroughly considering and defining what is meant by management development before Sections Four and Five make specific recommendations about how development is to be achieved. As outlined in the research Preface, essentially management development is a systematic process aiming to ensure that the school has the effective managers it requires for present and future needs. The measurement of current management attributes (knowledge, skills and attitudes) and those required in the immediate and more distant future can be illustrated by the 'gap analysis'

model, Figure A.

Figure A: THE GAP ANALYSIS MODEL:



The gap analysis model is a standard analytical tool used in management of a wide range of organisations. The model can be applied to the school management context very effectively so that individual managers or governing bodies as a whole can begin to identify the gaps or weaknesses which are reducing their ability to manage effectively.

The application of the model can be illustrated:

1A) What attributes do managers have now?

e.g.) What do governors know about the National Curriculum core and foundation subject implementation phasing?

2A) What attributes should managers have now?

e.g.) Do governors understand the teaching staff and curricular resourcing implications of subject implementation phasing?

3A) What attributes will managers need in the immediate future (1-2 years)?

e.g.) Do governors understand the teaching staff and curricular resourcing implications of the next subject implementation phase (1-2 years)?

4A) What attributes will managers need in the more distant

future (4 years)?

e.g.) Can governors predict and plan for teaching staff turnover and the maintenance of an appropriate staff structure to deliver the National Curriculum over 4 years? Can they monitor and assess the effectiveness of its implementation over this time?

The comparison of the responses to question 1A and the example with other question responses helps to identify 'gaps' or 'attributes which are lacking'. The question to be asked next is: how should the gap be closed? The answer may come from the governors themselves, or there may be a need for a neutral facilitator to suggest a range of alternative learning strategies.

Management training, management education and management development can be conceptualised as three apices of a 'management triangle', with the individual client (or group) viewed as being in the middle. Management training provides specific, often self-contained management attribute modules. Management education provides a module inter-relationship structure. Management development facilitates the individuals' analyses so that they choose the appropriate training modules and inter-relationship structure to support their long-term needs as managers of their specific schools.

Management development is a process which thus tackles the issues of improving performance, providing managers with opportunities for growth and development and, important in the context of the four year governing body cycle, securing a strategy for management succession. As the SMTF estimates

a 40% turnover of governors every four years, the scale of the problem in ensuring management development and maintaining management structures is considerable. The management succession of the school senior staff (and the headteacher, though far less regularly) must be secured similarly, as the National Curriculum illustration has shown. It is worth considering this in the light of the earlier discussion in this study about separate or joint training or development for governors, headteachers and senior staff. It would seem to be potentially counter-productive to develop separately if long-term succession was an important target for management development.

It is important to consider management development conceptually as a range of related activities which will succeed if all levels of school management are committed to it, but the lead is clearly given by senior management. Commitment by school managers will be critical if the management of change (i.e. to self-managing schools) is to be successful. Summarising Buckley's concern about the "school leaders'" role as agents of change, Glatter stated:

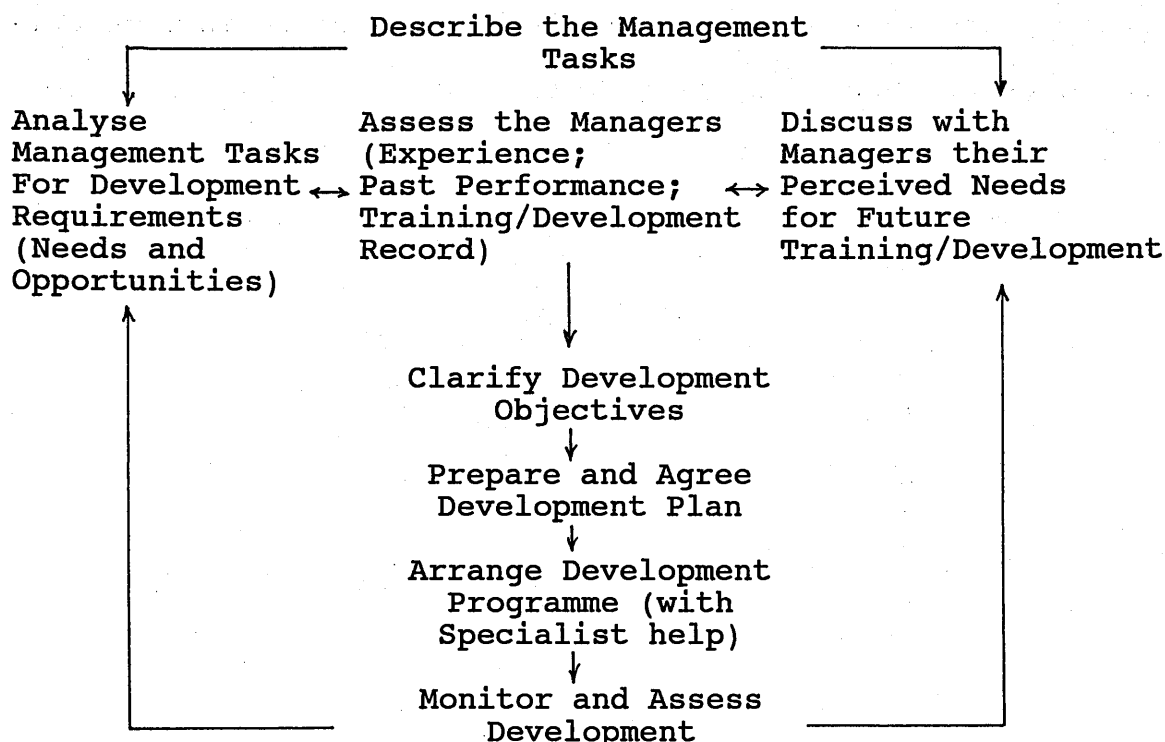
In fact Buckley identifies as the major problem facing European secondary school leaders 'managing the present while preparing for the future at the same time' (Buckley, 1985:22). He argues that this problem is made more severe when training programmes increasingly emphasise the school leader's role as a change agent which the individual is expected to fulfil while preoccupied with the task of maintaining day-to-day stability, and he considers that trainers should give careful attention to this dilemma. (Glatter 1988 p129)

To manage change, the process of management development begins with the gap analysis model described above. The second stage is to equate the identified gaps to a

methodology for closing these: the management development process model, Figure B. This is a fairly standard procedure in much of the world of commerce and industry, the model being a management tool which presents the stages which contribute to effective management development and which the author believes can be used equally effectively in the school management process. The model clarifies as a visual representation the sequences and inter-relationships which exist, and provides a path or paths to follow, with iterative loops where relevant.

As can be anticipated from Figure B, the process can be carried out by governors, headteachers and senior staff themselves but is probably more effective if they are assisted by an external facilitator. It could be the case, for example, that the managers' perceived needs for future training/development do not match the analysed management tasks, or it could be the case that the managers have failed to match their perceived needs with their past experience or past performance. It would take the skill of the neutral facilitator or 'training/development consultant' to propose the most appropriate match.

Figure B THE MANAGEMENT DEVELOPMENT PROCESS MODEL:



The clarified development objectives in the model can incorporate the long-term senior management succession in schools, but should also include middle management (heads of department in Secondary schools, 'teachers responsible for' or 'curriculum leaders' in Primary schools). If current predictions of demographic trends and manpower are accurate, it may well be necessary for senior management to realise that a higher proportion of future school senior managers may come from the school's own middle management structure through internal promotions. And, as Osborne observed when discussing the work of Peters:

He goes on to explore the dynamic nature of excellence and to suggest that quality is really about training and unlocking the potential of the workforce. This can only be done, he suggests, by moving from the hierarchy and towards a position in which everyone is a manager. (Osborne 1990 p17)

The management development process model should build in

this factor, ideally avoiding the criticism voiced by Earley and Fletcher-Campbell after their research into middle management that:

The NFER research shows that some middle managers did not feel very well prepared for the post... Most off-the-job training that was available was invariably offered after the appointment had been taken up. Similarly, there was no evidence of planned induction courses for heads of department. (Earley and Fletcher-Campbell 1990 p193)

This Section proposes that management development is the emphasis for future learning programmes and therefore development should be seen in the context of the long-term management needs of a school. The management development recommendations which follow in Sections Four and Five acknowledge this and apply to all those who are part of the school senior management team. It should be recognised that middle management, though not the focus of this study, should be included in this process. This need for long-term management planning was expressed by the School Management Task Force (SMTF) when it reported:

Management development is not just about the development of managers. It must encompass the maintenance and development of the schools' management structures. The loss of key people through retirement and promotion creates problems for all management teams. Although many individual resignations are unpredictable, local patterns in vacancies are discernible. It is therefore possible to monitor the situation, determine the general trends and predict future recruitment needs. Succession planning begins with this type of analysis and goes on to consider what action can be taken to increase the chances of filling vacancies with a minimum loss of overall management performance. (SMTF 1990 p26)

The SMTF report, taken in conjunction with the gap analysis approach and Osborne's observation, above, strengthens the proposal that management development is the learning concept for the future support of managers. In Sections Three, Four

and Five, the term 'training' will be used where it has been used by other authors, or when referring to earlier Chapters of this study. In discussing the future and making firm recommendations, the term 'development' will be considered as the most relevant concept.

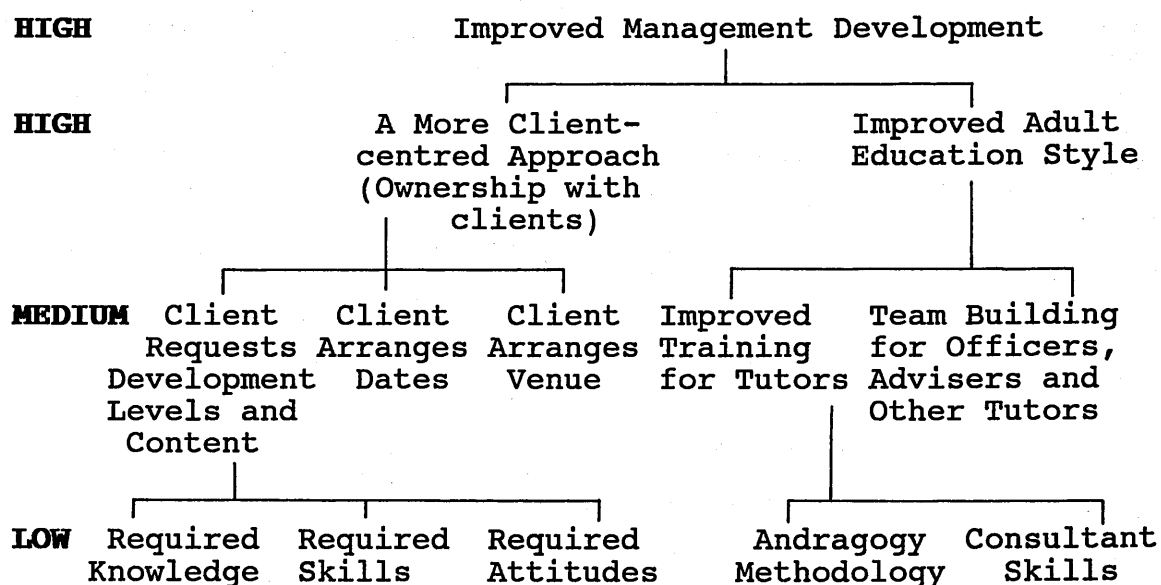
SECTION THREE: FUTURE MANAGEMENT DEVELOPMENT OBJECTIVES.

This Section recommends that a set of objectives for future management development is established, based on the discussion of development needs and the questions to be answered that were identified in Chapter Five. These objectives are then placed in an objectives hierarchy, and the recommendations for future management development initiatives to meet these objectives will follow in Sections Four and Five.

The objectives recommended are illustrated in the 'objectives tree', Figure C:

Figure C: OBJECTIVES FOR FUTURE MANAGEMENT DEVELOPMENT

Objectives Level:



"Improved management development" is the highest level objective, effectively a 'super goal', the need for this having been clearly established in the preceding Chapters. To effect improved management development this high level objective can be split into two significant second level objectives i.e. "a more client-centred approach (ownership

with clients)" and "improved adult education style" should be achieved. Each of the second level objectives is achieved if the recommended third or medium level objectives are met, and these in turn are achieved if fourth or low level objectives are met.

The objectives tree is a conceptual tool, however, and it should not be interpreted as suggesting that the two 'strands' of improved development i.e. the second level objectives, are discrete. They should be complementary approaches to improved management development and they should be mutually supportive. To illustrate this, if tutors are given improved consultant skills (right hand strand) they will be better equipped to help identify the appropriate level and content of management development (left hand strand) and advise the client governors and headteachers accordingly.

The power of this conceptual tool is that it can be applied to the gap analysis model and the management development process model introduced in Section Two. The 'tutors' on the objectives tree are the 'neutral facilitators' or 'training consultants' in the Section Two discussion. If the objectives outlined above can be met, the tutors will have the necessary skills to apply the two models and contribute to school management development significantly. The methodology of meeting the objectives will be outlined and recommendations made in Sections Four and Five of this Chapter.

SECTION FOUR: RECOMMENDATIONS TO IMPLEMENT A MORE CLIENT-CENTRED APPROACH (OWNERSHIP WITH CLIENTS).

The development of a "More Client-centred Approach" to management development is a second level objective. The target of this objective is the handing over of the ownership of the management development process to the school managers. If ownership is secured by the managers this will reduce or eliminate the possible threat of interference or influence from outside bodies, however august they may be perceived to be.

The assumption is made, of course, that the clients know what management development they want, and recognise that which they should have (even if they do not particularly want it). The difficulty of assessing need has been illustrated in earlier Chapters when comparing the Questionnaire and Table 1. The role of consultants in assisting clients in this assessment process will be discussed in Section Five.

As discussed in Chapter Five, there is some evidence for Government, Member and Authority influence or ownership of the management development process. This influence has created some tensions during training which tutors have had to handle. In the instances examined the tension has tended to be negative, which may reduce the effectiveness of the learning process. (Tension can be positive, for example where it can be channelled into generating solutions to problems which might otherwise remain unsolved without any creative tension.) The general principle of attempting to avoid negative tension will be pursued in the

recommendations made in this Section.

Esp considered that Authorities would have to face a new supportive relationship with schools and that, therefore, ownership must effectively be given to the school. He said:

An LEA which is philosophically 'in tune' with the new climate will be prepared to change its role and relationships with schools and to provide support to relatively autonomous schools. An LEA which wishes to preserve its monopoly producer role will find many of the necessary changes unpalatable and may have difficulty in adapting successfully. (Esp 1989 p172)

The transfer of ownership of management development to the clients may be a painful process for Authorities, but one which they should accept, even if they do not remain the principal providers of management development but become facilitators engaging external tutors. If ownership is not transferred there may be a continuing problem for tutors delivering the management development programme. For example, in South Glamorgan there have been some instances of tutors questioning whether their commitment to delivering management training was worth it if governors are openly hostile to the 'Authority messages' that are given, as Mr. T.'s comments illustrate. Much depends on the tutor's ability in handling hostile criticism, and improved training for the tutors themselves would enable them to handle criticism more confidently. One advantage, therefore, of giving clients more ownership of the management development process is that of reducing the criticisms, thereby reducing the likelihood of tutors deciding not to continue with their contribution to management development.

Clearly, if the ownership of development is handed over to

the client it does not automatically entirely remove the capacity of tutors to communicate the Authority viewpoint i.e. the Authority retains some ownership. But equally, nor is it necessarily desirable to expect total ownership to be instantly accepted in the environment of change. Fullan described the growth of ownership, rather than it being an identified completed action. He said:

Deep ownership of something new on the part of large numbers of people is tantamount to real change, but ownership is not acquired that easily.... Ownership in the sense of clarity, skill and commitment is a progressive process. True ownership is not something that occurs magically at the beginning, but rather emerges during a successful change process. (Fullan 1990 p68)

As ownership emerges, if the clients can set their own development agenda or syllabus they are able to avoid those management areas which they might feel Government, Members or the Authority would wish to influence them. As Fletcher pointed out:

Governors are getting put off if they feel that the LEA doesn't know what they are doing. Good governor training meets the needs of the governors rather than the LEA. (Fletcher 1990 p116)

This is echoed by Buckley whose comments support the author's proposed use of the gap analysis and management development process models. Buckley, considering the needs of headteachers, said:

They (headteacher participants at management workshops) also stressed that in the present economic climate it was important that school leaders and their staffs should take as much responsibility as possible for their own learning and tailoring training to meet their individual needs. (Buckley 1985 p130)

HMI came to a similar conclusion when they observed:

While most authorities agree that the identification of training needs is essential to

the quality and relevance of governor training, few have yet to establish formal consultation procedures. Governors in particular have an important part to play in the development and delivery of governor training provision and have a valid claim to be part of any consultation process. (HMI 1989 p15)

The research Questionnaire results indicated that Authorities had consulted more widely than HMI appeared to suggest, and where questionnaires had been used the Authorities had consulted quite formally. By inference, therefore, it must be interpreted that HMI envisaged a continuing process of consultation after the initial identification of training needs. In South Glamorgan the governor training advisory panel and the strengthened links fostered by school-based cluster training have provided for continuing consultation and the author is aware that other Welsh Authorities are following similar consultative paths.

This model would be consistent with Checkland's description of the management process where collaboration (which in this case would involve those supporting management development) is a necessary response to changes imposed upon the school system from outside i.e. legislation. He observed:

The management process...is concerned with deciding to do or not to do something, with planning, with considering alternatives, with monitoring performance, with collaborating with other people or achieving ends through others; it is a process of taking decisions in social systems in the face of problems which may not be self-generated. (Checkland 1988 p30)

As the objective tree illustrates, the client-centred approach gives school managers the ownership of the levels and content of the development. The first recommendation of this Section is that:

Clients choose the levels and content of management development, including the short-term 'core modules' and long-term 'in-depth modules' that are offered by the Authority. Clients should be able to request new modules where they perceive them to be relevant in their own school context.

The net effect of this could be that the introductory core syllabus identified by this research is replaced by a variety of in-depth school-specific syllabi as school managers' learning curves steepen and experience broadens. In anticipation of this net effect, the author avoids prescriptive recommendations about the modules that Authorities should offer in the future.

Referring specifically to finance and budget management development as of special interest of this study, it will be important for clients to be able to choose the knowledge, skills and attitude attributes they deem to be necessary. The strength of this approach will be looked at again in Section Five when the consultant skill recommendation will be applied in an illustrative situation.

It is worth noting, however, that in this study the content of finance and budget management development has, perhaps surprisingly, been subsumed under the general discussion of medium level objectives: it is the process and methodology of management development (high level objectives) which are the key considerations. But in fact this echoes Levacic's observation of the need for: "Common sense applications of a few key techniques", in Chapter One. Finance and budget

management is but one facet of the range of new management responsibilities which management development must support.

To achieve relevant management development levels and the right content of modules Knight anticipated what he described as a menu of learning experiences:

The problem isn't just numbers; it's the range of governors' needs, preferences and availability that creates the difficulties. If training is really to meet individual governors' needs it must offer a menu of learning experiences: - courses (whether central, cluster or school based); - individual or small group study; - governors' self provided training (including visits to other schools); - printed information; - person-to-person guidance. (Knight 1990 p89)

The SMTF pointed to the new emphasis of provision which would be necessary, and their management development outline picks up the theme of client-centred multi-level development. While directing their comments to teachers, they are equally pertinent to all managers and in particular to the senior management team of governors, headteacher and senior staff. The SMTF stated:

Time should be made available for teachers to undertake training, but programmes must be organised to create the minimum disruption to the work of the school. This will require a radical review of the general balance of provision. There should be a shift of priority along the following lines:

CURRENT EMPHASIS**REDIRECTED EMPHASIS**

tutor-directed courses	support for self-directed study by individuals, school teams, peer groups
off-site training	in-school and near-to-school training
predetermined times	flexitime study
oral presentations	distance learning materials, information packs and projects
provider-determined syllabus	school-determined agenda
knowledge acquisition	performance enhancement
(SMTF 1990 p20, p21)	

The redirected emphasis outlined by the SMTF is wholly compatible with the objectives established earlier in this Chapter. It also reiterates the results of INSET research on the importance of school-based (client-centred) courses commented on by Bolam who noted:

As already mentioned, most school-focused approaches have not been evaluated in any systematic way. The SITE project was exceptional in this respect and it did provide some reasonably hard evidence about the positive impact of the approach. (Bolam 1987 p6)

The second recommendation of this Section is that:

The redirected emphasis on in-school or near-to-school management development and training necessitates the school managers setting the date and venue which best suit their needs.

The school-determined agenda will provide for relevant levels and content for the training. In so doing the medium level objectives will be met. The whole strategy for a school's management development should be designed at the

school by governors, headteacher and senior staff, perhaps with the tutor acting in a facilitator, consultant or observer role, as has been discussed. McMahon and Bolam suggested the need for an Authority school management development coordinator (the 'tutor' in terms of this study) and a school-based coordinator. They recommended:

Management development is a relatively new concept in education. When schools are just starting to build up their own management development programmes it can be very useful to have a named person to whom they can turn for advice and help. (McMahon and Bolam 1988 p70)

This model accords well with the client-centred objective, and the use of consultant skills accords well with the improved adult education style lower level objective.

The SMTF recognised that in-school or near-school management development is the third of three phases of training which have progressed during the last decade, Phase One being off-site knowledge and skills acquisition, Phase Two being off-site experiential learning. The SMTF observed that:

The third phase has seen a discernible move in leading organisations, including some schools, towards a more integrated, corporate approach to the development of the workforce...The achievement of the organisation's purpose is dependent on the quality of staff performance. In seeking to improve performance it is recognised that individual development is directly related to the structure and quality of the everyday working experience far more than to off-site training experiences, important though these may be. (SMTF 1990 p8)

One of the potentially important vehicles for management development provision is that of flexible open learning which can be client-orientated, as the SMTF suggested:

If training were planned on the basis of a corporate response to individual initiative, it would place great emphasis on flexible open learning structures designed to be readily

accessible at the time of need for individual and group use and demonstrating the characteristics outlined above. If the same principle were extended to the broader measures of support we are recommending to LEAs and schools, the concept of entitlement, to support rather than simply training, would be feasible and would provide a further perspective on the targets for development which should be set for the next few years. (SMTF 1990 p25)

This Section recommends that a client-centred approach will strengthen the school managers' ownership of the development process, and recommends that the school-based provision will satisfy the third level objectives identified i.e. development levels, content and client-directed dates and venues. Looking in more detail at the nature of the provision, and bearing in mind the relationships already existing between some schools, there is a case to be made out for 'clusters' of schools to share their management development.

In South Glamorgan as an example, Primary 'feeder' schools to a Secondary school or a number of neighbouring Secondary schools are organised in clusters. The clusters form the basic unit for the provision of training and development for teaching staff, tending to focus on the Primary level. As relationships have been established in these clusters, and between feeder Primary and Secondary schools, they could be an appropriate arrangement for management development involving the whole of their management teams i.e. governors are included.

An example of how the cluster arrangement for management development might help achieve the fourth level objective of required knowledge and skills would be where Primary

schools and Secondary schools were planning the National Curriculum delivery in core and foundation subjects. A smooth transition from Primary (National Curriculum Level Two) to Secondary (National Curriculum Level Three) is desirable and obviously teaching staff, but also governors, should have the chance to effect that transition.

So too would it be relevant for small primary schools without the necessary staff subject skills to undergo joint management development so that a sharing of skills can be established. Sharing of skills may provide the only means whereby small Primary schools are able to meet the demands of delivering the National Curriculum.

"Required attitudes" is a fourth level objective of management development. This objective could cover attitudes to education in general, and the attitudes to relationships between neighbouring schools in an environment in which the pressures of open enrolment may strain those relationships. These strains are potentially a difficult management challenge. Clusters of schools could usefully develop management together in order that these strains are minimised, if that is the accepted culture of the school managers concerned.

The third recommendation of this Section is that:

Clusters should be considered as an appropriate organisational unit for management development delivery.

The benefits of bringing together managers (though not necessarily cluster group managers in this case) are advocated by Edwards when considering budgetary issues.

Edwards observed:

Training which brings together mixed-interest groups from each school and which is specific rather than general is much more successful. If a team comprising the chairman and vice-chairman of governors, the head and a deputy, the bursar and an assistant are brought together with similar teams from other schools and have to perform simulated budgetary tasks or set up financial systems, they invariably put aside their grouses and work together in order to demonstrate that their school can perform at least as well as the next. (Edwards 1990 p32)

Further, school-based management development would strengthen the school-community links, particularly where governors were seen to be participating in local management development, rather than going to off-site locations. The importance of the managers in the environmental system was commented on by Kast and Rosenzweig in Chapter One. The Questionnaire responses showed limited demand for external relationship training while Table 1 identified it as a requisite management attribute. The matter of external relations was also addressed by Sayer and Williams who felt that:

There is an immediate need to work on managing outwards, on negotiation with other schools and services, managing not just the ship but the currents around it or even the swamp in which it is stuck. The grey areas of external management are the ones which heads feel least confident about and that they least enjoy, because of the ambiguities.... The senior management team has the particular responsibility to develop structured partnership with other organisations, and to develop the capacities and the organisation of the school accordingly. (Sayer and Williams 1989 p143)

In the context of the recommendations for client-centred management development, to effect the partnership proposed it would require a number of clients to meet to agree a common management development agenda and strategy. The agenda ownership would remain with the clients, thus

satisfying the high level objective. Sayer and Williams believed the approach to be worthwhile, observing:

From the few examples that have been tried it is evident that management training programmes for school leaders, advisers and governors together, in-house, across a local community and across local boundaries, make good sense for a future agenda of shared management of schools in the community. (Sayer and Williams 1989 p147)

This supports Cooper and Shute's view in Chapter Five that these personnel were the "key group" in the training (development) process. Sayer and Williams see the arrangement as the logical progression towards the in-depth development of all managers stating:

The argument here is for a combined form of training for teachers, governors and others that is specific and relevant to the needs of particular schools and their communities.... Future training programmes must incorporate needs reflected in the composition of the new groups through simultaneously addressing in situ professional and community interests. (Sayer and Williams 1989 p159)

In summary, by establishing the objectives for improved management development Section Four has answered two questions: (i) for whom is the management training really intended? (ii) how can the most appropriate management training programme be delivered to school managers? The third question, (how can school-specific finance and budget management training be provided?) has effectively been subsumed by the client-centred model proposed, but Section Five will return to this in more detail.

The strategy recommended is that of handing over the ownership of management development entirely to the clients. The clients will thus be able to choose the content (including finance and budget management), levels, skills,

)
knowledge and attitudes that they wish to develop, either as
managers of a single school or as managers of a cluster of
) schools. Clients will be able to choose the dates and venues
for management development activities. It will be possible
for clients to make their choices unaided, but Section Five
) will consider how an improved adult education style (a high
level objective) will enable tutors to guide their choices,
and thereby enhance the quality of the management
) development process resulting from these choices.

SECTION FIVE: RECOMMENDATIONS TO IMPLEMENT AN IMPROVED ADULT EDUCATION STYLE OF MANAGEMENT DEVELOPMENT.

The 'objectives tree' presented identified the other second level objective as "Improved Adult Education Style". The question to be answered in this Section is: what are the principles of good adult training and how should Authorities inculcate and implement these principles for the future benefit of all school governors, headteachers and senior staff? Before recommendations about achieving the objective and answering the question are made, at this point it is relevant to consider briefly the concept of adult learning or development methodologies, comparing the fundamental techniques of 'pedagogy' with those of 'andragogy', the latter being the methodology of adult learning.

'Pedagogy' is the art and science of teaching children and is at the heart of the delivery of the National Curriculum. It is not necessarily the most appropriate methodology for many adults, as Chapter Five has indicated. It is of course the methodology encountered by the majority of adults who have been through some sort of schooling experience and, if they have not needed to go through any other forms of further education or higher education since leaving school, it is the learning model that they retain through life. Some governors may be reasonably satisfied with this model however, not knowing any other. For example some of the interviewed South Glamorgan governors indicated that in some aspects of their training programme they would have been content to "sit and take notes" as they had done when they were at school. So, while recommending that future training

or management development should take on a more clearly defined adult learning methodology, it must be remembered that some governors may find this threatening, as Mr. T. and Mr. P. had indicated when being interviewed.

The methodology for adult learning, 'andragogy', has been discussed by Malcolm Knowles in: "The Adult Learner: A Neglected Species" (Gulf 2nd Edition, 1981) However Tennant observed that Knowles': "Humanistic concepts of self-development and self-direction have gaps and weakness which need to be acknowledged." (Tennant 1988 p23) The author has found, when designing and implementing a management development programme, that Knowles' andragogical precepts are a satisfactory starting point and so will comment on Tennant's criticisms, where relevant.

Andragogy is based on a number of assumptions which are worth exploring before applying these to support the management development recommendations that follow. Each assumption (and comment on Tennant) will be illustrated by a school management situation in which school managers (governors, headteachers and senior staff) can be recognised.

Andragogy assumes that adults have developed a self-concept which encourages them to strive towards self-direction; this is a psychological need. In effect, the adult says: "This is what I want to learn about," and any situation in which the tutor appears to be influencing significantly the direction of learning which does not agree with the direction that the adult wants creates a tension which impedes the learning

process. It can be recognised from this that self-direction implies a significant ownership of the learning process, thus reinforcing the importance of this approach outlined in Section Four.

The author accepts Tennant's quote of Brookfield, that: "Very few researchers have chosen to investigate the self-directed learning activities of working class adults." (Tennant 1988 p24) The author has perceived that "working class" governors place a greater reliance on tutor-directed learning but, though a sensitive issue in defining, an estimated 80% of governors in South Glamorgan currently tend to be "middle class", the author endorses the self-directed assumption.

To illustrate the desire for self-direction, the school governors will probably wish to direct the process of finance and budget learning. For example, once the basic rules of formula funding and school budget generation are understood during introductory training, the governors will wish to direct the learning process to a more in-depth understanding of the relationship between resources and education delivery at their own school. They may wish to know the formula funding details of the age-weighted pupil units in order to decide how to resource the phased introduction of the National Curriculum. To facilitate this learning need, the tutor should have available a range of materials and exercises which will allow the governors to choose how to explore the application of the rules to carry out their school-specific management responsibilities.

The second assumption of andragogy is that an adult is, effectively, an 'accumulation of experiences' which is part of their essential persona. These experiences should ideally contribute to the learning process and they constitute one of the major differences with the pedagogical approach, namely that pupils have relatively few experiences on which to draw as a learning resource. If the adult learning process ignores the importance of experience to the individual, it ignores that individual's persona. Adult learning should therefore encompass some action-learning techniques to encourage the individual to share experiences with others.

Governors, headteachers and senior staff will have gained experiences, as suggested above, in deciding how to resource the National Curriculum. They may have viated resources from another budget heading into teaching materials, aware of the decision-making path that they had to follow to assess the various resourcing options that were available to them. While this would clearly be specific to their own school situation, it is the experience of the decision-making process that they can usefully share with other governors during management development.

The third andragogical assumption is that the readiness of adults to learn increases as a result of their taking on roles and responsibilities for functions within society. Their concern is that they are able to carry out these social roles and responsibilities effectively and it is important, therefore, for adults to feel competent in the functions they carry out. They are willing and often seem

highly motivated to learn how to fulfil their relevant functions.

The author is sympathetic to Tennant's observation that the social role may have implications for the learning process. For example, experienced chairmen and politically-nominated governors have been observed dominating training and limiting the contribution opportunities of others.

The fourth assumption, and linked to the readiness to learn, is that it is assumed that adults tend to have a problem-centred orientation to learning. This results from their experience in situations of social roles and responsibilities in which they feel that they have perhaps failed or have not functioned as adequately as they would have wished. They naturally wish to learn so that they can implement a more responsive stance to management problems in the immediate future.

Perhaps heightened by the present focus of society on educational matters, for governors their relatively high profile roles and responsibilities in the education world make them ready to learn. The problems that they encounter lead naturally towards a problem-centred orientation to learning. However their readiness to learn, and the nature of the problems encountered, will change with time and experience and so the theory of andragogy acknowledges that appropriate levels of adult learning must be recognised by tutors. This is entirely consistent with the recognition of levels of management development outlined in Section Four.

Tennant pointed out that adults can postpone the application

of knowledge so that "problem solving" is not a necessary training method. The author has found problem-solving approaches to be more favourably received, involve more participants actively, and achieve a higher evaluation score at the end of the training session. This answers Tennant's further comment: "Finally, argues Brookfield, there has been insufficient attention given to the quality and worth (value) of the learning activities reported." (Tennant 1988 p12)

Applying the andragogical concepts discussed above to the objectives identified and the desirability of making appropriate recommendations for the future, a third level objective was that of providing training (or development) for the tutors who would act as facilitators for management development. This assumes that Authority tutors continue to provide development. If Authorities use other tutors as well it is still a valid argument for those tutors, and if necessary for Authority tutors, to have relevant training. To achieve tutor development, the fourth level andragogical methodology objective would be the principle focus of that training. The first recommendation in this Section is that: **Authorities equip tutors with the relevant andragogical methodology.**

To achieve this objective tutors should have opportunities to understand and practise appropriate techniques with the support of experienced adult educators. Authorities will therefore have to become more proactive and take on the responsibility of ensuring that tutors receive this support. If, as has been suggested by HMI and is firmly supported in

this Section, the appropriate adult education methodology is vital for an improved management development experience in the future, Authorities may be required to consider buying in the required expertise, bringing more adult educators in from further education and higher education institutions to support and supplement the volunteer tutors. The Questionnaire showed a few Authorities had already done this.

It is argued, therefore, that the recommendation to establish an andragogical methodology for all governor tutors will require adequate adult education tutor support and funding: it is unlikely that it will be satisfactorily carried out without resourcing. Current funding levels will constrain this development.

The second recommendation of this Section is that:

Authorities consider funding 'external' adult tutor support to work with, or in parallel with, 'Authority tutors'.

The final objective at the fourth level of the objectives tree was to develop consultative skills in tutors. This would be a considerable shift of emphasis in their own roles, and would change their role as perceived by the school senior managers. The consultant model for management development has generally been developed to support industry and commerce; it is occasionally but increasingly used in the public services sector. To recommend that a similar approach would be beneficial in the education sector might suggest that schools were becoming like businesses and therefore management development should reflect this. The

recommendation made in this Chapter must emphasise the relevance of the consultant methodology in its contribution to schools being, perhaps, more 'business-like' in their management, but not being run like businesses. As Mr. T. indicated, the concept of a 'market-orientated' school, to which pupils were to be attracted like customers, is philosophically unacceptable in his case although some governors have indicated that they could come to terms with this market-orientated culture, the culture identified in Chapter One as being supported by 'The New Right'.

What is important in avoiding the business mentality in school management development is that, as in commerce, with school governing bodies the tutor consultant would be invited in as a professional whose brief is to encourage management development but not to inculcate a business philosophy. As Osborne noted:

In short the simplistic 'business model' is no substitute for a much more radical and exciting blend of management of and for professionalism which may be within our grasp. (Osborne 1990 p2)

The one difficulty, and it impinges on ownership of development, is that the consultant brought in by commerce is a 'neutral' professional whereas Authority tutors may inevitably be open to the charge of being part of the Authority 'system'. The Authority will have to work hard to establish and support the integrity and credibility of its tutor consultants.

Aware of many of the positive lessons that could be learned from management development models in commerce, the SMTF commented on the support that industry could provide the

education service. They commented:

Several large firms with a strong record of service to education have signalled an interest in adopting a more strategic role. They can see the added benefits of working with the education service to improve its own capacity for management development, rather than increasing dependence on their support. The integrated approach to management development proposed in this report requires the LEA to reassess its policies and restructure its support services as an integral part of its wider reorganisation. Industry has much to offer in a consultancy role in policy development and in designing staff development programmes for officers and advisers preparing to undertake new tasks.... Some LEAs are already drawing advice and assistance from industry in this area of work, either individually or in consortia. (SMTF 1990 p21)

The third recommendation of this is that:

Management development programmes in the future enable tutors to develop a consultant approach.

The advantage that consultant skills bring is that of being able to draw together the various management demands that the clients may make, without the consultant having any preconceived ideas about the direction of development. The demands may be demands of content, of course levels, or any other skill requirements. Authorities should perhaps consider using industry to share its consultant skills to help in the preparation of tutors, or consider industry providing tutors to work in teams with the Authority's existing governor tutors, as already suggested in this Chapter. Authorities will once again need to assess carefully the cost of industry consultants, however, for the current level of Authority funding from the DES or Welsh Office may meet the salary of a governor training co-ordinator and the tutors' fees, but is unlikely to cover the fees of professional management development consultants. The

consultants, as professionals, have to earn a living and consultants' fees reflect the professional service which they provide.

Authorities are going to have to take an important decision about the position of Officers and Advisers as they prepare to respond to management development initiatives. As was noted in Chapters Four and Five, while Officers and Advisers have different perceptions of management development needs (illustrated by National Curriculum and Finance and Budget analyses), they may have shared objectives for management development. Holmes et al also warned:

There are potential tensions, however, between the staff development needs perceived by LEA members, officers and advisers, governors, senior staff in schools, staff teams, and individuals. (Holmes et al 1989 p12)

The Questionnaire data analysis revealed that Officers and Advisers were perceived as becoming more important in delivering training as the phases of training progressed.

A medium level objective was to undertake team building for Officers and Advisers, eliminating or at least redefining the traditional demarcation of responsibilities that still exists in some Authorities. Provided with adult education skills and consultant skills and methodology, Officer and Adviser management development tutors could have an important role to play in supporting governing bodies.

The task of building a more effective Officers and Advisers Team is not as straight forward as it might seem to be. As Stillman and Grant noted:

It is important to note that while problematic relationships between advisers and officers were

reported on many occasions during the research, and these were often described as causing unnecessary difficulties, many reasons for these problems were outside the control of either side, not the least being a system which has salary conflicts built into it. (Stillman and Grant 1989 p203)

The salary issue is taken up by the SMTF when it reported:

We also urge that at the earliest opportunity the salaries and conditions of service of teachers, officers and advisers are brought into a single system. This would have the major benefit of enabling management of the whole service to be seen as a single profession, with individuals, throughout their career, undertaking different roles and moving from one aspect of the service to another. (SMTF 1990 p22)

Perhaps the climate of educational change in the early 1990s is the right time for Authorities to change salary structures to enhance the team building of Officers and Advisers, but Brooksbank observed that even in the early 1980's the division of responsibilities was not an automatic Authority response to functions. Brooksbank said:

The boundary line between Education Officers and advisers is often blurred and there are even authorities which do not attempt to draw a distinction but appoint to posts that combine administration and advisory duties. (Brooksbank 1980 p27)

If Authorities wish to establish stronger teams to support management development in the future, the issue of Officers and Adviser operating in a team structure should be carefully considered. The fourth recommendation of this Section is that:

Multidisciplinary Authority teams of Officers and Advisers are a logical development and an appropriate response to the changing climate of educational management.

To illustrate the application of the adult education methodology of multidisciplinary teams with consultant

skills for future management development, and the ownership of development being passed clearly to the clients, the case of a school considering the implementation of the National Curriculum will be investigated.

The governors or headteacher, as clients, would request a visit by the Officer/Adviser team, making arrangements about the time and venue to suit the governors. The clients would provide the team with the relevant information that they wish to consult on, and the team would have the support of relevant Authority information to verify that the problem was as the clients had described it.

The Officer/Adviser team would act as facilitators so that the clients were guided through a standard and rational management decision-making cycle. The first analytical tool would be the application of the gap analysis model, Figure A, described earlier. The clients might identify that staff specialist skills and enhanced management skills, with appropriate incentive allowances for management responsibility, were needed in a particular curricular area. The application of the management development process model, Figure B, would help clients identify the responsibilities, and the methods for achieving identified objectives. It would be at this point that the Officer/Adviser team guided the clients to ensure that Questionnaire "National Curriculum", "Staffing" and "Budget and Finance" equated to Table 1.

The purpose of the consultant team is to provide a broadly neutral stimulus to enable the clients to examine all the

issues, though the team may well have identified what they believe to be the 'perfect solution' having checked the background information for themselves. The team's neutrality is intended to ensure that the ultimate decision must rest with the clients.

The strength of the multidisciplinary team comes, for example, from the Officer being able to identify personnel implications and budget solutions. The Adviser would help the clients to identify any constraints that the existing teaching structure and experience might place upon the management and delivery of the National Curriculum.

Throughout the consultative process the Officer/Adviser team would allow the clients to decide on the long-term knowledge, skills and attitudes that they wished to bring to the problem: this would be the quintessential axiom of management development. And, in effecting this, the consultant team would be able to contribute to any part of the preparation of the school development plan, discussed in more detail in Section Six, where the clients requested support and advice.

Authorities should also deliberate on the position of governors and headteachers themselves in the context of the consultant team. It would seem to make good sense to use any expertise available in management development. The fifth recommendation of this Section is that:

Authorities should consider governors and headteachers as a potential source of tutor support to broaden the tutor teams.

If an Authority does see it as being desirable that Officers and Advisers should become part of a broader team with more experienced governors and headteachers to assist management development, obviously all must participate in the process of honing adult education skills and the consultant skills recommended above. This requirement was emphasised by Roberts and Baker where they noted:

Urgent attention should also be given to better training for heads, education officers, advisers, organisers of governor training courses and others, focussed upon their role in supporting governors. The scope for joint approaches to management development of schools involving heads, teachers, governors and others should be explored with appropriate training providers. (Roberts and Baker 1988 p36)

The integration of headteachers and more experienced governors into the management development team was also commented on by the SMTF when it stated:

There are strong arguments for integrated training programmes involving officers, heads and governors. LEAs can also look for opportunities to draw them into authority working parties and policy study groups where they can gain a wider understanding of the service, sharing ideas and experience. Governors can be encouraged to recognise that a limited amount of time spent on such 'non-school' activities often provides a personal development opportunity of greater value than ad hoc attendance at courses and conferences. (SMTF 1990 p19)

To promote the integration of key personnel into a management development team the SMTF suggested that the allocation of LEATGS should be reviewed. SMTF recommended that:

LEATGS funds may not be used by LEAs for the training of officers, advisers, governors or ancillary staff. We think this is a major weakness and recommend immediate action to rectify it. Procedures that govern LEATGS have recently been reviewed and we hope that they will be reviewed again, so that a satisfactory resolution of this problem can result. It would be one way to bring

everyone together in common activities for corporate development. (SMTF 1990 p22)

It should be noted that the SMTF tends to concentrate on the overall school management issues without specifying governors as part of the process; the research presented here has adopted this attitude. In their report HMI, in contrast, are commenting specifically on governor training, with references made to headteachers and Officers, when relevant. The slightly different perspectives should be borne in mind when reading the quotes from these two bodies.

If the SMTF recommendation is accepted (as appears to be happening with the introduction of GESTs in 1991) it will perhaps release the funding resources which HMI identified as a problem in the complex issue of identifying headteachers and governors to act as tutors, and to provide them with the sort of skills which this Chapter is recommending. HMI reported:

Several of the organisers and trainers reported that it had been unexpectedly difficult to identify heads and officers ready or able to make effective contributions to governor training. Many lacked confidence and few had been involved in the training of adults.

In general, governor training coordinators were keen to involve more governors as trainers but recognised that this would require additional specialist training which most felt that they had neither the time nor the relevant expertise to provide at the present stage. (HMI 1989 p13)

The release of LEATGS to be used more flexibly could clearly help the Authorities in significantly extending the resourcing that was available for incorporating Officers and Advisers, and headteachers and governors where they were willing to be involved, into management development teams. In so doing, the ownership of the management development

process would remain firmly with the relevant headteachers and governors, aided, when invited, by Officers and Advisers. The greater flexibility of LEATGS could also allow for the funding of some outside consultant help in management development, where appropriate, and would contribute to quality assurance as Holmes et al observed:

Schools, which have complained ineffectively about the quality and relevance of some in-service training provided by LEAs and establishments of higher education, will now be in a much stronger position as purchasers to specify the nature and quality of training. (Holmes et al 1989 p32)

In summary, by establishing the objectives for improved management development Section Five has answered the question: what are the principles of good adult training and how should Authorities inculcate and implement these principles for the future benefit of all school governors, headteachers and senior staff?

The strategy recommended is that of training ('developing') tutors so that the methodology of andragogy is understood and can be put into practice. This methodology can be supplemented by tutors having appropriate consultant skills which will improve their performance in drawing out the themes of the client-directed management development, such as the content, levels, and the required knowledge, skills and attitudes. The strategy will be reinforced by team building so that Officers and Advisers are more integrated and have shared management development perspectives; some headteachers and governors might wish to be included in these teams. External consultants and adult education tutors are an invaluable source of expertise and support for these teams.

Section Six will review the training needs analysis, evaluation of training and data collected from Authority and published commentaries, with the case study information from South Glamorgan in Chapters One to Five. This material has led to the recommendations that have been made in Chapter Six. The recommendations will be placed in the context of a school management cycle model which will tie together analysis, evaluation and recommendations.

SECTION SIX: CHAPTERS ONE TO FIVE REVIEWED; REFLECTIONS ON THE RECOMMENDATIONS MADE; THE FUTURE OF SCHOOL MANAGEMENT.

Chapter One of this study established that school governors, headteachers and senior staff would receive increased responsibilities as a result of the Education (Number 2) Act 1986 and the Education Reform Act 1988.

Chapter Two discussed the training programmes necessary to meet the increased responsibilities of school managers.

Chapter Three set out the framework of the research strategy which was designed to achieve a statistical database of Authority training programmes in England and Wales.

Chapter Four presented the 'global' and more detailed data analyses to assess themes and strategies in the Authority training programmes.

Chapter Five discussed the main issues which arose out of the research data, and also those issues which emerged from the analysis but which were not anticipated when the research was started.

Chapter Six has made recommendations which should apply equally well in all Authorities, including South Glamorgan which the research has shown as being a reasonably typical Authority. The recommendations are for improving management 'training' by advocating that Authorities adopt a management 'development' model approach. Ownership of the management development process would be retained by school managers. The Authority tutors, applying andragogical techniques, and acting in a consultant role, might be supported by

headteachers and some experienced governors as part of the tutor team. Outside tutors, hired by the Authority, could contribute and reinforce teams, where relevant.

In beginning to bring this research to a conclusion, it is important that the recommendations made in Section Four and Five of this Chapter are seen as attempting to achieve the high level objectives set out (and the lower level supporting objectives) in Section Three. These objectives can be applied, and should satisfy, the requirements of the school management model (described in some Authorities as 'school development plans'). This model should be a feature of school management that enables school managers to plan much more rigorously than in the past, managing their school-specific allocations to resource school-specific educational objectives. As Hargreaves et al stated:

The development plan captures the long-term vision for the school within which manageable short-term goals are set. The priorities contained in the plan represent the school's translation of policy into its agenda for action. (Hargreaves et al 1990 p1)

Authorities will not have the freedom to manage all schools 'globally' in future, and therefore the school development plans are seen as an essential means of providing school governors, headteachers and senior staff with a management tool to carry out their own management.

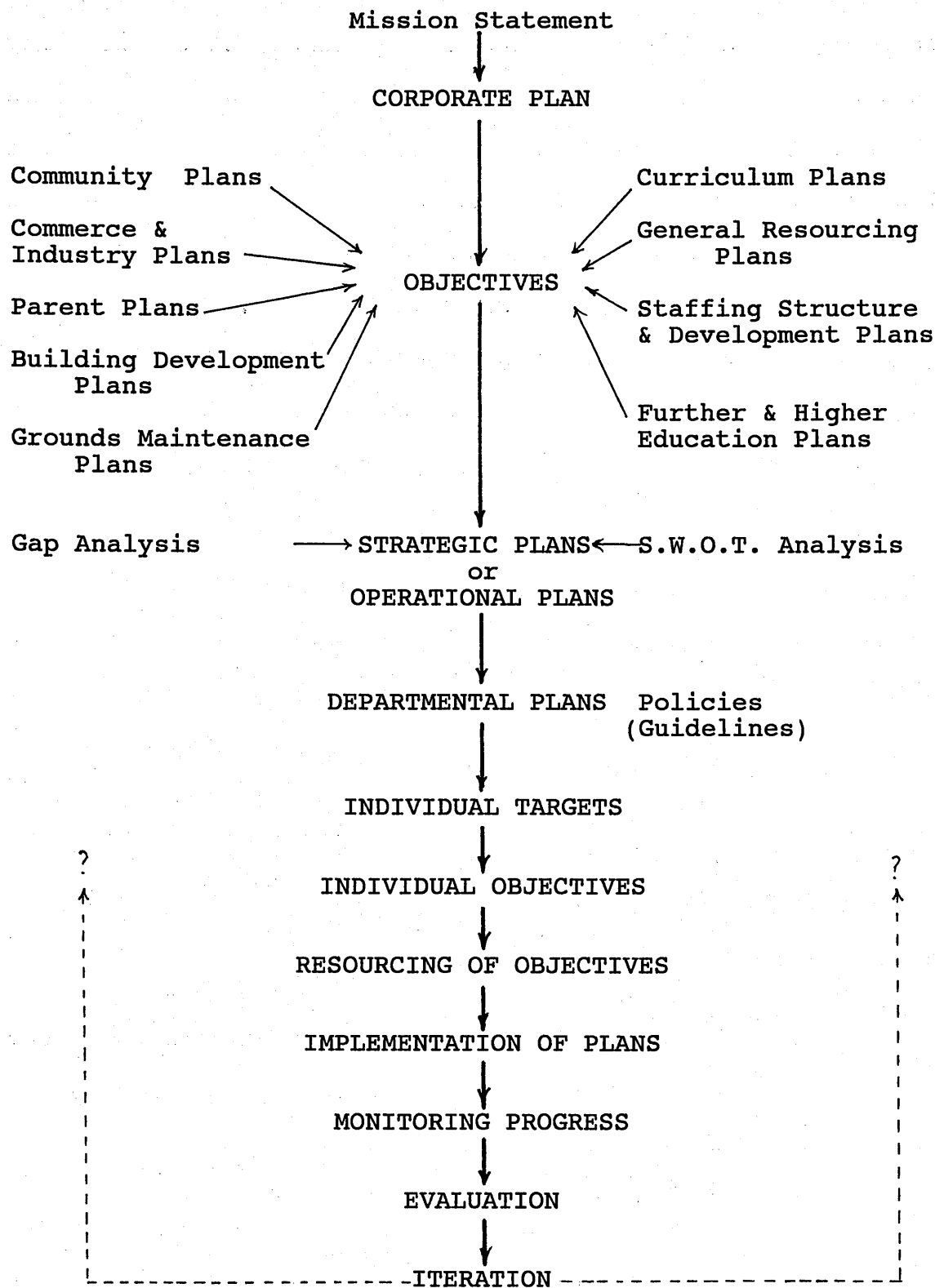
The management model is presented below, Figure D, adapted by the author from a standard business cycle model used in commerce. The model is a conceptual tool which helps to assemble what might appear to be disparate strands of a fairly complex set of hierarchical activities. The model

identifies inter-relationships which, in any activity system, ultimately determine its effectiveness. These inter-relationships are critical in any human activity system, in contrast to largely automated activity systems which, once designed and constructed, have structured inter-relationships which do not necessarily change. Schools, being essentially human activity systems, depend on appropriate supportive inter-relationships. The issue of inter-relationships within an organisation will be discussed later in Chapter Seven when further research possibilities are considered.

It should be noted that Figure D is based on a proposed model for a secondary school development plan, and therefore a primary management model would contain a number of differences. For example, the reference to "Commerce & Industry Plans" might not be relevant in the primary school, and "Further & Higher Education Plans" would probably appear as "Secondary School Plans". However the basic structure of the process of management should be similar in both sectors of education.

The application of the school development plan follows the sequence below. The first stage is the writing of a corporate plan which encompasses the essential elements of the school's high order aims: the "mission statement". The corporate plan must then be broken down into objectives, these incorporating a number of plans, as indicated.

Figure D: SCHOOL DEVELOPMENT PLANS: A DIAGRAMMATIC STRATEGY



It is at the stage of developing the necessary strategic plans or operational plans that the theoretical 'this is

what we would like to do' becomes 'this is how we are going to attempt to do it'. As indicated on the model, it is here that the governors, headteacher and senior staff carry out the gap analysis and apply the management development process model. The "SWOT analysis" requires the school managers to identify "Strengths, Weakness, Opportunities and Threats". For example, a school which has a particularly 'strong' Science staff could be under threat if they are all close to retirement age. The implementation of the National Curriculum will require experienced managers to guide its successful introduction. Thus it is at this point that school managers decide whether they have the necessary management attributes (skills, knowledge and attitudes) to carry through their school development plan, referring back always to the mission statement which is effectively the marker for the way forward for the school. The Officer/Adviser consultant team could contribute, as could outside consultants (including experienced governors and headteachers from other schools, if appropriate). The recommendations made in this Chapter fall into place at this stage of the management model and are consistent with the concept of management 'development' to support school managers in achieving effective management.

Having identified and developed the necessary management attributes, the senior managers direct middle managers and other the school staff to carry out the rest of the school development plan. Though not the focus of this research, where middle managers and other staff become an integral part of the development plan, Hargreaves et al argued that:

The quality of staff development improves. In-service training and appraisal help the school to work more effectively and teachers to acquire new knowledge and skills as part of their professional development. (Hargreaves et al 1990 p2)

Departments (or 'teachers responsible for' or 'curriculum leaders' in primary schools) draw up plans to be achieved, individuals being given targets and objectives which school managers must ensure are resourced adequately. Plans are then implemented, monitored and evaluated. The iterative stage of the model may be necessary if, for example, the monitored outcome of a plan does not meet the objectives set. Iteration takes the managers back to a higher level of the model to reconsider whether they had set reasonable objectives, or whether the gap analysis had failed to identify all the training/development needs for the managers to implement strategic plans effectively.

The purpose of this research was to consider: "The Training of Governors, Headteachers and Senior Staff in Preparation for Local Management of Schools (LMS), with Particular Reference to Financial Management". As with many research projects, as more material was accumulated and analysed it became clear that the initial focus of the research on financial management was being subsumed under a number of more important emerging themes. It was the process of management, and in the context of this research the preparation for management i.e. 'training' or 'development', that had emerged as the key area.

As new management disciplines are established, such as the writing of the school development plan, the research has identified the importance of long-term management

development for school managers. The recommendations made to effect the development process have been presented so that they fit into the school management process model. In Table 20 the author assesses how recommendations could equate with Table 1 requisite attributes. If Authorities find the model and the recommendations acceptable, there are many issues to be resolved as to how the recommendations are to be implemented.

TABLE 20: RECOMMENDATIONS:

1. Clients choose the levels and content of management development, including the 'core modules' and 'in-depth modules' that are offered by the Authority. Clients should be able to request new modules where they perceive them to be relevant in their own school context.
2. The redirected emphasis on in-school or near-to-school management development and training necessitates the school managers setting the date and venue which best suit their needs.
3. Clusters should be considered as an appropriate organisational unit for management development delivery.
4. Authorities equip tutors with the relevant andragogical methodology.
5. Authorities consider funding 'external' adult tutor support to work with, or in parallel with, 'Authority tutors'.
6. Management development programmes in the future enable tutors to develop a consultant approach.

7. Multidisciplinary Authority teams of Officers and Advisers are a logical development and an appropriate response to the changing climate of educational management.

8. Authorities should consider governors and headteachers as a potential source of tutor support to broaden the tutor teams.

MANAGEMENT TRAINING NEEDS: Recommendations Which Should Particularly Enhance The Performance Of Managers Via

	CONTENT	METHODOLOGY
Management Cycle.	1, 3, 5, 7, 8	4, 6
Personnel Management.	1, 3, 5, 7, 8	4, 6
"Output Management".	1, 3, 5, 7, 8	4, 6
Management of Teachers & Curriculum Delivery.	1, 3, 7, 8	4, 6
Budget & Data Management.	1, 3, 7, 8	4, 6
"Other Management".	1, 3, 7, 8	4, 6

The author would argue that the recommendations equate well with the analysed management training/development needs.

The final conclusion to be drawn in this research is that the commitment of Authorities to supporting school managers in the future will be assessed in the light of how they respond to the needs of providing management development. This research has offered a framework for Authorities.

CHAPTER SEVEN

REFLECTIONS ON THE RESEARCH PROJECT.

PREFACE: This Chapter will be divided into three Sections which will reflect on the research undertaken and the possibilities for future research.

Section One will look at the practical lessons which the author has learned from carrying out the research, and the wider aspects of academic discipline which he has learned from.

Section Two will consider how the research project might have been conducted differently and more effectively. The purpose and content of the research will not be questioned: the Section will analyse how alternative approaches and techniques might have sought a deeper insight into management training processes.

Section Three will consider the possibility of future research that the author might undertake, extending an aspect of the current research which the author is particularly interested in.

SECTION ONE. LESSONS LEARNED FROM UNDERTAKING A RESEARCH PROJECT.

This Section will present three lessons which have been learned from conducting research, two relating directly to the research discipline, the other lesson a product of the author becoming more perceptive of the management development which he is involved in delivering.

The research itself has revealed the difficulty of investigating a rapidly developing situation. Begun in 1988 and submitted in 1991, the research was undertaken during the critical initial years of the introduction of the Local Management of Schools. During this time formula funded school budgets were introduced and governing bodies began to take on delegated responsibility and accountability. So too were schools having to implement the National Curriculum.

While the author is confident that the need for management development and the concomitant recommendations for the future can only be made if a thorough analysis of a current situation is undertaken, the pace of change brought about by major reforms complicated the research task and the author found difficulty in deciding when he had absorbed sufficient information to begin to consider making valid, relevant management development proposals for the future. Indeed, as the final Chapter of the research is being written, evidence is emerging in South Glamorgan of some headteachers becoming resistant to the concept of joint governor/headteacher management development. The author is thus conscious of having to draw a developing situation to a premature conclusion.

The second lesson learned was that the research process revealed a change of emphasis that can take place over a three year study period. The author's inception of the research subject focused on finance and budget management within the Local Management context. The submitted thesis places emphasis on management development as a process rather than a range of content-specific modules including finance and budget management. The lesson learned, therefore, is that the broadening and deepening of the author's understanding of the research subject matter has encouraged a maturation and perceptual evolution. The focus of attention has evolved considerably from the early interest in finance and budget management.

The third lesson learned from conducting the research is that the author's perceptions of management development within the Authority have changed. When starting the research the Authority (i.e. South Glamorgan) was relying on a team of volunteer tutors to help deliver the management training. Being part of the governor training panel monitoring training, the author was therefore aware of the feedback that was building a picture of the difficulty that the Authority had in adequately supporting the volunteer tutor teams. While the volunteer tutor teams were probably the only solution during the initial phases of management training, the recommendations in this research for future management development are for Officer/Adviser consultant teams. The methodology to be applied by consultant teams is probably beyond the capacity of the volunteer teams. It seems likely that the volunteer tutors will only be used for

introductory management development in the future - probably for new governors. The lesson learned, therefore, is that the author has been encouraged to reflect on the wider issues of management development beyond the research subject.

In summary, the lessons learned from conducting the research are that the pace of change causes difficulty in drawing a convenient boundary around the 'research subject system' (in Checkland's terminology); maturation and perceptual evolution are a product of the research process, as is the necessity of looking beyond the research subject. Section Two will consider how the research might have been carried out differently with the wisdom of hindsight.

SECTION TWO: ALTERNATIVE APPROACHES.

This Section will examine the areas of the study which the author would consider doing differently. Each suggested improvement to the research would enhance the data collection techniques employed, data providing the source material on current management training upon which the recommendations for future management training have been made.

When conducting a research Questionnaire approach to Authorities, the author would attempt to improve the return rate and strive to achieve a target of more than 80 responses. The author feels that a personal distribution of the Questionnaires (and the explanatory letter) to those Officers attending the regional and national conferences on Local Management early in 1989 would probably have improved the chances of responses. Officers' questions about the Questionnaire could have been dealt with relatively easily and, in so doing, the sharing of personal tasks and problems would have reinforced the personal commitment of those receiving the Questionnaires.

Questionnaires and the explanatory letter would be sent to those Officers not contacted at the meetings. The author feels that this method would improve the response rate and would achieve the 80+ target. The author would have to consider any differences between the statistical data from responses of those contacted personally and the data from the purely 'postal responses', but statistical reliability should be improved by a higher response rate.

To improve the governor group monitoring of South Glamorgan governor training the author would monitor over a longer period. Extended monitoring would provide an opportunity to test whether the tutors were providing a better course of modules as they became more familiar with the material. It would also help to assess whether the modifications which the Authority made to its modules as a result of initial feedback were successful. The South Glamorgan group monitoring research data presented and discussed in Chapters Four and Five of this study suggests a reasonably successful governor training programme. The data is, however, only a 'snapshot' and the author would attempt to collect data over a period of perhaps eighteen months to improve statistical validity.

The third research change would involve the in-depth monitoring of the volunteer governor group. The author would wait until he was a more 'established figure' within the Authority's Officer structure, during which time many more formal and informal contacts would be made, before requesting volunteers to help with the research. The author believes that a larger volunteer group of perhaps twenty governors and ten headteachers would provide a more reliable statistical source base, and in so doing would enhance the validity of the conclusions drawn from the research.

The final change that the author would hope to implement is employment stability during the anticipated study period. While promotion opportunities should be taken, research material which would have been based largely on Norfolk as a case study had to be abandoned in favour of South Glamorgan

)
research material. Fortunately the author made the move
fairly early on in the study period, but problems were
) created (partly as a result of having to establish new
working relationships) which were demoralising at a time
) when enthusiasm and determination should carry a researcher
through the important creative phase of the research.

SECTION THREE: FUTURE RESEARCH.

The area of research which the author has become increasingly interested in, largely as a result of his professional responsibility of handing over Authority management of schools to the Local Management of Schools, but also as a result of his research into management development, is that of organisational culture.

The author perceives organisations as having to respond to their 'environment', as the systems model (Appendix 8) showed. In the case of the school, a very simple definition of the environment is that it describes anything outside the perimeter fence: central and local government, educationalists (but not teachers), parents, the local community, and so on.

Each of these components of the environment could bring influence or pressure to bear on the school (Local Management of Schools and the National Curriculum are two significant current influences or pressures). To respond to the environment an organisation creates a number of inter-related structures. In the school, for example, teaching staff structures are established to respond to educational influences, pastoral structures to respond to social and emotional influences, extra-curricular structures to respond to physical and cultural influences. These structures may be based on a number of conceptual models, such as the collegiate model, but the binding force which supports these structures and holds the whole organisation together is the organisational culture.

The author has become very conscious of the cultural differences between schools in the Primary and the Secondary sector, but also conscious of cultural differences between schools within either sector. In terms of the Local Management of Schools the author suspects that some structures, and the culture which supports them, will enable some schools to respond to the changes and manage 'successfully'; others will find difficulty.

The author is interested in answering three questions:

- 1) Is it the case that some organisational cultures are more capable of responding to change than other cultures?
- 2) Can we identify a 'successful management culture'?
- 3) What are the essential attributes of a 'successful management culture'?

In Chapter One of this study Kast and Rosenzweig spoke of "inputs from society" and Coopers and Lybrand stated that a "new philosophy and culture" would be required by schools under Local Management. The author would be interested in researching how schools respond to society's inputs, what new philosophy and culture emerges, and whether Handy's models of organisational culture (club, role, task and person cultures) are applicable in understanding these changes. The ultimate question to be answered in the research would be:

What are the 'successful' cultures in the Local Management of Schools?

APPENDIX 1.

GLOSSARY

GOVERNORS: all members of the governing body except the headteacher. Teacher governors are therefore 'governors', whether they are deputy headteachers, senior or other members of staff.

HEADTEACHER: the most senior member of teaching staff in terms of the school management hierarchy. In a school-specific role, outside the context of the governing body, the term 'headteacher' will be used as a the generic term for the 'headteacher and deputies team'.

SENIOR STAFF: the school-specific senior management team, outside the context of the governing body. This is likely to number between three and ten staff and consist of deputy headteacher(s) and heads of department/faculty in secondary schools. It is likely to number between two and five and consist of deputy headteacher and 'teachers-with-responsibility-for' in primary schools.

Should the terms 'governors', 'headteacher' and 'senior staff' prove inadequate in any discussion of management, specific reference will be made in the text to individuals or other teaching staff.

Some authorities use 'headteacher', others 'head teacher'. This study will use 'headteacher', but quotations will be presented as they were originally written.

AUTHORITY: the Local Education Authority; 'authority' will refer to an individual or a group with expertise and opinions which contribute to the understanding of an educational issue.

SCHOOLS: primary and secondary schools controlled by the LEA, diocesan 'voluntary controlled' schools and, where the general principles of Local Management are concerned, 'voluntary aided' schools. The last category has had more management control for many years now and, as shall be shown, other schools will move towards their present position. However all these schools will move farther along the path of Local Management together and it is not within the reference of this study to consider any differences between these categories of school.

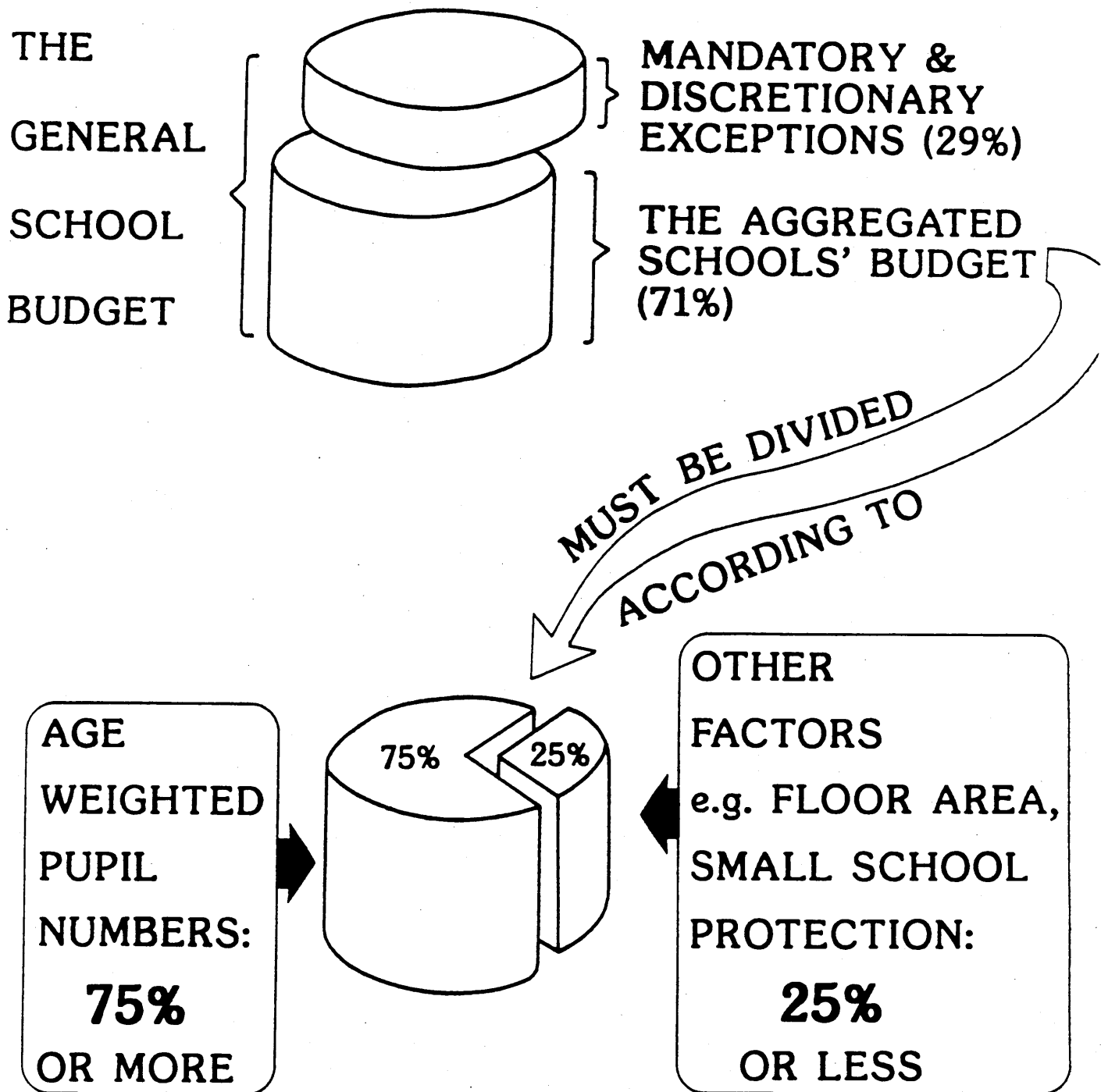
APPENDIX 2.

SECONDARY HEADS' ASSOCIATION LMS REVIEW.

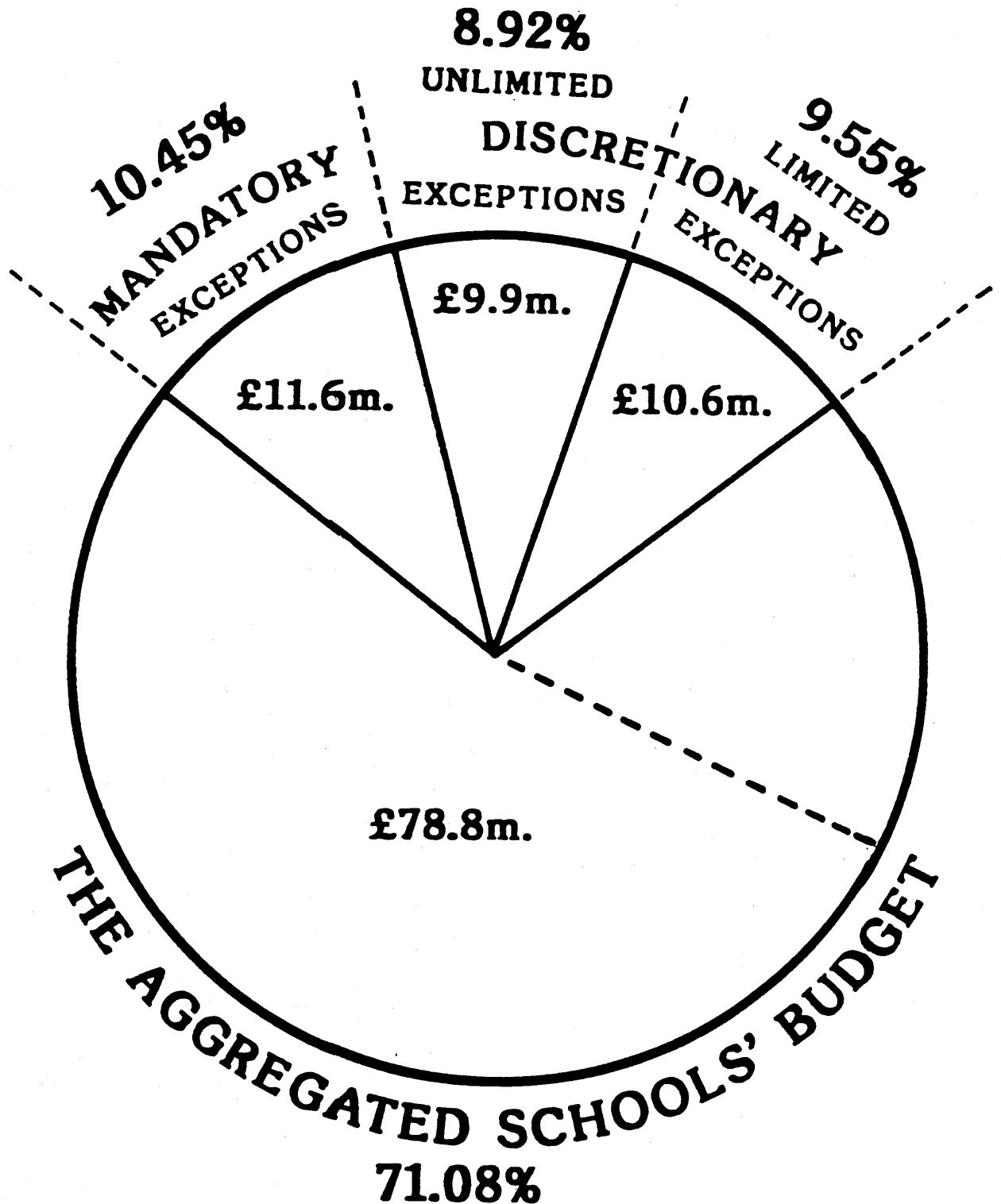
An analysis by the Professional Committee of the Secondary Heads' Association (summarised by Bowker, 1987) revealed that in July 1986 of 77 Authorities replying to questionnaires on LMS, 18 (23%) had some sort of pilot scheme running or under active planning. Of the 20 (26%) Authorities 'considering change' only one stated that an existing scheme in another Authority was the reason for a possible change. 6 Authorities (8%) stated that the reason was external auditor or consultants' comments, the Education Bill, the Audit Commission or their own Education Committee. No Authorities acknowledged any influence of Taylor or pilot schemes abroad.

The study suggests little evidence of any strong influences on Authorities to pilot Local Management schemes, other than perhaps auditors at various levels looking for ways of achieving better value for public money. Even here their influence was only acknowledged by a few Authorities.

LMS - THE BASIC RULES



THE GENERAL SCHOOLS' BUDGET



APPENDIX 5.

NORFOLK: HEADTEACHERS' RESPONSES TO AUTHORITY QUESTIONNAIRE.

How should training be organised geographically?

School clusters	5
Based in individual schools	2
Based in Areas	1
County-wide	1
Unsure (or no indication)	4

How should groups be trained?

Governors and staff separately	5
Heads and Deputies	3
Governors, heads and staff together	1
Unsure (or no indication)	4

What are the priority topics?

Planning resource allocation	8
Monitoring procedures	7
School development plans	6
Staff appointments	3
Computers and administration	2
Governing body meetings	1
Setting priorities	1
Public relations	1
Decision making	1

(13 replies out of 56 secondary schools)

APPENDIX 6.

SOUTH GLAMORGAN: GOVERNORS' AND HEADTEACHERS' RESPONSES TO AUTHORITY QUESTIONNAIRE.

KNOWLEDGE:

Finance	52	*
Curriculum	34	*
Legal responsibilities and Law	26	*
1986 and 1988 Acts	18	
Buildings	5	
Health Education	4	
Special Needs Education	4	
Multicultural Education	2	

SKILLS:

Interviewing and Staff Appointment	50	*
Communication	23	
Governing Body Meetings	19	*
General Management	16	
Monitoring and Performance Indicators	6	

ATTITUDES, ROLES and RESPONSIBILITIES:

General governors' roles	28	*
Governing Body interaction	16	
Government/LEA/Governor relationships	10	

(In practice it was felt worthwhile including 'communication' as part of the governing body meeting session.)

Key: * Introductory Training Programme.

APPENDIX 7.

SOUTH GLAMORGAN: PRIMARY AND SECONDARY HEADTEACHERS' RESPONSES TO AUTHORITY QUESTIONNAIRE.

How should training be delivered?

	HEADS ALONE	HEAD + GOVERNORS	HEAD + SENIOR STAFF	HEAD + SENIOR STAFF + GOVERNORS
Roles, Responsibilities	4%	55%	1%	40%
Governing Body Meetings	8%	59%	3%	30%
Finance and Budgets	8%	38%	10%	44%
National Curriculum	10%	10%	18%	62%
Interviews & Appointments	4%	71%	1%	24%
Legal Responsibilities	1%	44%	3%	52%

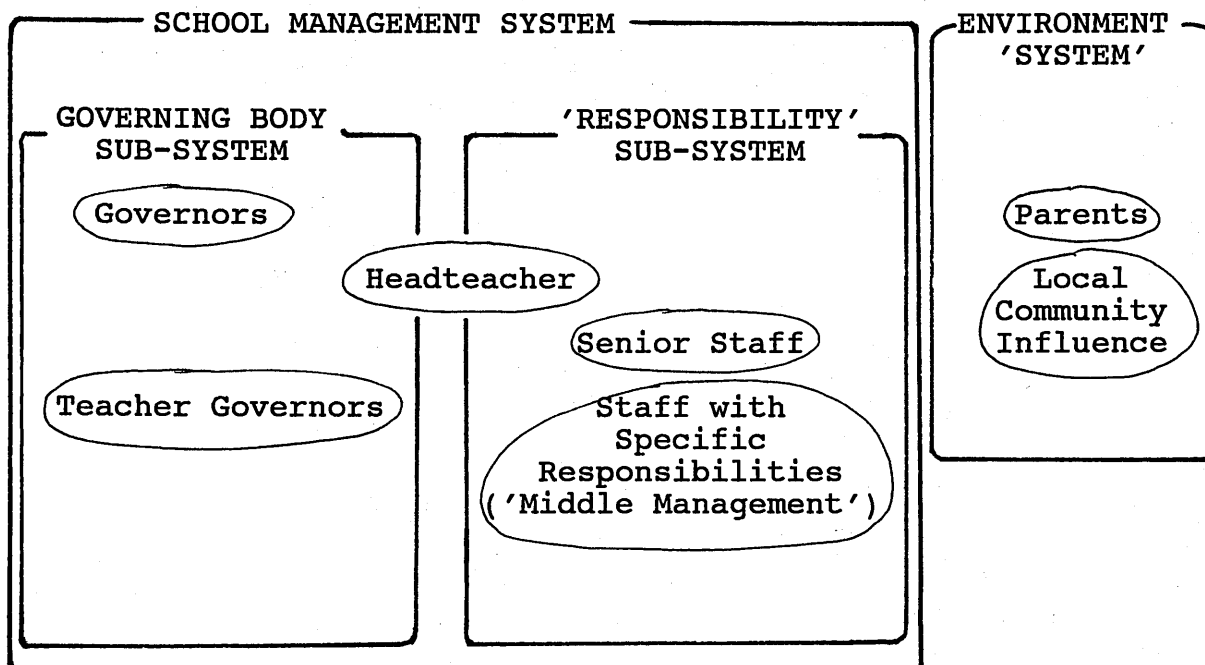
(73 responses)

APPENDIX 8

A SYSTEMS ANALYSIS OF SCHOOL MANAGEMENT.

In summary, the systems approach (see 1988 "SYSTEMS BEHAVIOUR" by Open University Systems Group) analyses 'components' or 'elements' into a management system with a conceptual 'boundary'. A management system may be divided into sub-systems. Were a component to be removed from the system, the system's characteristics would be changed. Elements outside the boundary are in the 'environment', unaffected by the system, but affecting the system.

The concept of a 'school management system' is presented below. Viewed with the Table 1 analysis, the training needs of components (i.e. individual governors, headteachers and senior staff) and those of the components within the sub-system and system can be identified. The training needs of the system in order that it can respond to the environment can be identified.



APPENDIX 9

FOR THE ATTENTION OF MR N C H VARNON

AUTHORITY RESPONSE:

To assess how the IDENTIFICATION OF TRAINING NEEDS for governors and school staff has been carried out, in the columns marked 'Significance' please tick one box for each input which indicates how you perceive the input from the source categories suggested, adding any others in the spaces provided which are of relevance to your Authority.

(If the governor training needs have not yet been identified, or if the identification process is still progressing, it would be quite acceptable to record either 'Nil' or 'Low' in all of the boxes.)

SIGNIFICANCE:

IDENTIFICATION OF TRAINING NEEDS; SOURCE:	HIGH	MEDIUM	LOW	NIL
Questionnaire to Governors	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Written requests from Governors	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Verbal requests from Governors	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Questionnaire to Headteachers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Written requests from Headteachers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Verbal requests from Headteachers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Written or verbal input from:				
LEA Officers responsible for training	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other LEA Officers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Advisers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Elected Members of the Council	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other LEAs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Universities/Polytechnics	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Higher Education Colleges	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Adult Education Institutions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	HIGH	MEDIUM	LOW	NIL
Church Authorities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PTA	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Trade Unions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Commerce/Industry	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
National Association (e.g. of Governors and Managers)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
DES Circulars/Welsh Office Circulars	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Research Publications (e.g. NFER)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Regular Publications (e.g. TES, Education)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Others (please describe briefly):				
.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

To assess the priority placed on the IDENTIFIED TRAINING NEEDS, in the columns marked 'Priority' please tick one box for each training need to indicate how the categories suggested are being considered in terms of priority in the preparation and delivery of training, adding any other categories in the spaces provided which are of relevance to your Authority.

(If the governor training needs have not yet been identified, or if the identification process is still progressing, it would be quite acceptable to record either 'Nil' or 'Low' in all of the boxes.)

	PRIORITY:			
IDENTIFIED TRAINING NEEDS:	HIGH	MEDIUM	LOW	NIL
1986, 1988 Act Details	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
National Curriculum	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Finance and Budgeting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Building and Fabric Maintenance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Grounds Maintenance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Health/Sex Education	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Governors and Staff Legal Responsibilities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Multi-Ethnic Education	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Gifted and Special Needs Provision	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Equal Opportunities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	<i>HIGH</i>	<i>MEDIUM</i>	<i>LOW</i>	<i>NIL</i>
General Management Skills	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communication Skills	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Governing Body Procedures	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Interviewing & Staff Selection Skills	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Monitoring & Performance Indicator Skills	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Roles of Governors	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Interaction with Other Governing Bodies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Interaction with Commerce & Industry	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Governing Body/LEA/Central Government Relationships	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Others (please describe briefly) in the spaces provided (broadly divided into content, skills and procedures, roles within and beyond the school).

To assess whether the Governors, Headteachers and Senior Staff from the same schools are going to be trained together or whether other strategies are being developed, in the columns marked 'Preferred Method' please tick ONE box for each identified training need to indicate the preference expressed within your Authority.

PREFERRED METHOD:

COLUMN A: GOVERNORS BY THEMSELVES; HEADTEACHERS BY THEMSELVES

COLUMN B: GOVERNORS AND HEADTEACHERS TOGETHER

COLUMN C: GOVERNORS BY THEMSELVES; HEADTEACHER AND SENIOR STAFF TOGETHER

COLUMN D: GOVERNORS AND HEADTEACHERS AND SENIOR STAFF TOGETHER

COLUMN E: NO PREFERRED METHOD EXPRESSED

Note: If you have added other IDENTIFIED TRAINING NEEDS categories, please indicate the PREFERRED METHOD for these as well.

Note: If there has emerged a marked difference in the PREFERRED METHOD for training Governors and Headteachers and Senior Staff of primary and secondary schools, you can indicate this by adding a letter to the boxes which you have ticked.

PRIMARY/MIDDLE SCHOOLS (P)
SECONDARY SCHOOLS (S)
SIXTH FORM COLLEGES (C)

Example Response:

	A	B	C	D	E
Finance and Budgeting	<input checked="" type="checkbox"/> s	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> p	<input type="checkbox"/>

PREFERRED METHOD:

IDENTIFIED TRAINING NEEDS	A	B	C	D	E
1986,1988 Act Details	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
National Curriculum	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Finance and Budgeting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Building & Fabric Maintenance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Grounds Maintenance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Health/Sex Education	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Governors & Staff Legal Responsibilities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Multi-Ethnic Education	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	A	B	C	D	E
Gifted & Special Needs Provision	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Equal Opportunities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
General Management Skills	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communication Skills	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Governing Body Procedures	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Interviewing & Staff Selection Skills	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Monitoring & Performance Indicator Skills	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Roles of Governors	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Interaction with Other Governing Bodies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Interaction with Commerce and Industry	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Governing Body/LEA/Central Government Relationships	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Others (please describe briefly) in the spaces provided (broadly divided into content, skills and procedures, roles within and beyond the school).

To assess the METHOD OF TRAINING DELIVERY (PERSONNEL) in the columns marked 'Significance' please tick ONE box for each of the delivery personnel suggested, adding any other categories of personnel that may be of relevance to your Authority.

(If the training delivery has not yet been structured or is in its early stages it would be quite acceptable to record 'Not yet used' or 'Low' in all of the boxes).

METHOD OF TRAINING DELIVERY (PERSONNEL):	SIGNIFICANCE:			
	HIGH	MEDIUM	LOW	NOT YET USED
LEA Officers responsible for training	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Advisers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
University/Polytechnic staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Higher Education staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Adult Education staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other Community tutors (part-time, occasional tutors)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Headteachers/School staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Governors	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Church Tutors	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Commerce/Professions training staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Education Consultants	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Others (please describe briefly):				
.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

To assess the METHOD OF TRAINING DELIVERY (MATERIALS) in the columns marked 'Significance' please tick ONE box for each of the delivery materials suggested, adding any other categories of materials that may be of relevance to your Authority.

(If the training delivery has not yet been structured or is in its early stages it would be quite acceptable to record 'Not yet used' or 'Low' in all of the boxes).

METHOD OF TRAINING DELIVERY (MATERIALS):	SIGNIFICANCE:			NOT YET USED
	HIGH	MEDIUM	LOW	
Materials produced by:				
LEA staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
University/Polytechnic staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Higher Education staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Adult Education staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Community Tutors	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Headteachers/School staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Governors	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Church Tutors	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Commerce/Professions training staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
LMS Initiative Training Package	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Education Consultants	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Open University	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
BBC/Local Radio/TV material	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Independent Radio/TV material	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
National Associations (eg NAGM)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other (please describe briefly):				
.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

To assess the METHOD OF TRAINING DELIVERY (GEOGRAPHICAL) please tick the box in column marked 'Main Strategy' the ONE description which best describes the Authority approach, adding your own strategy description if those offered are inadequate.

METHOD OF TRAINING DELIVERY (GEOGRAPHICAL):

(Tick): MAIN STRATEGY:

- | | |
|---|--------------------------|
| Single Governing Bodies/School Staff | <input type="checkbox"/> |
| Clustered Governing Bodies/School Staff (feeder primary with secondary | <input type="checkbox"/> |
| Clustered Governing Bodies/School Staff (urban/rural areas) | <input type="checkbox"/> |
| Clustered Governing Bodies/School Staff (Education Area Offices) | <input type="checkbox"/> |
| Open to all Governing Bodies/School Staff based on urban/rural centres | <input type="checkbox"/> |
| Open to all Governing Bodies/School Staff based on Education Area Offices | <input type="checkbox"/> |
| Open to all Governing Bodies/School Staff based on institution locations (eg university, college) | <input type="checkbox"/> |
| Other (please describe ONE briefly): | |
| | <input type="checkbox"/> |
| No Geographical Strategy has been developed yet | <input type="checkbox"/> |
| No Geographical Strategy is necessary in this Authority | <input type="checkbox"/> |

To assess how much time has been given to IDENTIFICATION OF NEEDS, the METHOD OF TRAINING DELIVERY (PERSONNEL), (MATERIALS), (GEOGRAPHICAL) please tick in the column marked 'Years' the ONE box which represents the amount of time which has been spent in preparing to train for the new responsibilities under the 1986 and 1988 Acts.

Time given to training (Tick) YEARS

Less than ½ year	<input type="checkbox"/>
½ to 1 year	<input type="checkbox"/>
1 to 1½ years	<input type="checkbox"/>
1½ to 2 years	<input type="checkbox"/>
2 to 2½ years	<input type="checkbox"/>
2½ to 3 years	<input type="checkbox"/>
More than 3 years	<input type="checkbox"/>

To assess how you perceive the current phase in preparing and delivering training for Governors (and Headteachers/Senior Staff) how would you describe your Authority:

TICK ONE BOX:

Identification of needs and general planning phase	<input type="checkbox"/>
Planning details of the introductory training phase	<input type="checkbox"/>
Delivering the introductory training phase	<input type="checkbox"/>
Assessment of introductory training phase	<input type="checkbox"/>
Planning details of the secondary phase	<input type="checkbox"/>
Other (please describe briefly):	
.....	<input type="checkbox"/>

GENERAL COMMENTS:

REQUEST FOR SURVEY RESULTS

Please address to: Mr/Mrs/Ms/Miss
.....
.....
.....
.....

AUTHORITY:

REQUEST FOR TELEPHONE CONTACT:

Telephone number (STD Code):



**SOUTH GLAMORGAN
DE MORGANNWG**

County Hall, Atlantic Wharf, Cardiff CF1 5UW
Telephone (0222) 872000
Fax (0222) 872222

My ref NCHV/PG
Your ref
Direct Line (0222) 87 2724
Date 16 May 1989

Dear Colleague,

I am carrying out research into the "training and/or support" of headteachers and school governors to enable them to deal with the 1986 Education Act and the 1988 Education Reform Act. This research is being supervised by the Open University.

I am particularly interested in the variety of approaches to training/support in Local Education Authorities, how the training/support needs have been assessed and how the programmes are going to be delivered.

As an Assistant Education Officer responsible for local management of schools I realise that a number of questionnaires relating to L.M.S issues are circulating at the moment making demands on officers' time. However, I should very much value your assistance in filling in and returning the questionnaire relating to your Authority. The questionnaire may take about 20 minutes to fill in but I have designed it, I hope, to offer a reasonably comprehensive range of answers, yet allowing Authorities to add to it, where appropriate. To achieve an effective Authority comparison, please respond for your Authority position as at the end of May 1989.

In return for your time, if you would like an analysis of the results of the survey, or wish to contact me about any issues or make general comments, the final page should be filled in.

I thank you in anticipation of your response, for which a stamped addressed envelope is provided.

*Yours sincerely,
Nicholas C.H. Varnon*

N C H Varnon, for
Director of Education

Encs.

NV1AGT

DIRECTOR OF EDUCATION: Derrick O'Rell

APPENDIX 11A.

STATEMENTS TO ASSESS KNOWLEDGE.

"Tell me about.."

1. The National Curriculum core subjects.
2. The range of girls games teams in the final year at school.
3. The in-service training available to subject specialist staff.
4. Who decides how much money is spent on Science.
5. The main heating source in school (i.e. oil, gas, electricity).
6. The content of the last school music concert.
7. The rooms involved in the last phase of internal decoration.
8. The Head teacher's views of the LEA activity-led staffing formula.
9. Pupil suspensions in the last 12 months.
10. The first three headings on the school annual budget.
11. The present or last job of the Chairman of Governors.
12. The number of staff paid on the main professional scale without incentive allowances.
13. The visitors to the school who contribute to the school assembly.
14. The member of staff responsible for pastoral counselling for boys.
15. The method of calculating the supply teacher total in the school budget.
16. Evening classes and activities on the school premises on Monday and Tuesday evening.
17. The right of Governors to suspend a member of the teaching staff.
18. The school's teacher assessment experience.
19. School staff internal promotions in the last 12 months.
20. The condition of chairs throughout the school.
21. The school policy on the responsibilities of pupils for the discipline of younger pupils.
22. The financial difference between a Scale A and a Scale B incentive allowance.
23. Attainment targets in the National Curriculum.
24. The budget allocation for spending on library books.
25. The content of the last full school staff meeting.
26. The hours worked by the caretaker.
27. The Head teacher's teaching experience before being promoted to Head teacher.
28. The percentage of male pupils in the final year at school.
29. The school's academic planning strategy for the next 12 months.
30. Out of school visits for first and second year pupils.
31. The procedure for Governors to visit lessons at the school.
32. School policy on swimming in the curriculum.
33. Mathematical aids and equipment used in the school.
34. Posts of responsibility with an incentive allowance held by female members of staff.
35. The school staff opinions about the school timetable.

36. School policy on fire drill practices.
37. The amount of litter in the school.
38. Performance indicators used in the school.
39. The difference between the role of the Head teacher and the role of the first deputy.
40. The destination of pupils leaving the school.

APPENDIX 11B.

STATEMENTS TO ASSESS CONFIDENCE.

To assess confidence governors were asked to record reactions on a five point scale of -2, -1, 0, +1, +2 to a series of 10 timed statements, again allowing 10 seconds to respond. The statements were:

1. I am confident in being able to interview a prospective Head teacher.
2. I am confident in being able to interview a prospective main scale teacher.
3. I am confident in being able to identify budget priorities for a future financial year.
4. I am confident in being able to assess the quality of learning in a subject area in the school of my own choice.
5. I am confident in being able to influence the views of the Governing Body if my views differ from those of the Governing Body.
6. I am confident in being able to influence the views of the Governing Body in an area of school life where I have gained specific knowledge and experience through my own particular interest.
7. I am confident in understanding the procedural practices of the Governing Body.
8. I am confident that I can evaluate the quality of the Head teacher's report.
9. I am confident that I can evaluate the effectiveness of a specific Governors' Meeting.
10. I am confident that I understand my role in the Governing Body and my responsibilities to the community as a whole.

APPENDIX 11C.

STATEMENTS TO ASSESS ATTITUDES.

To assess attitudes the same five point scale (i.e. -2 to +2) was adopted in responding to 10 timed statements, as follows:

1. I strongly support a policy of sex education in the school.
2. I strongly support a policy of removing disruptive pupils from the classroom.
3. I strongly support a policy of community service within the school as a form of punishment, when necessary.
4. I strongly support a policy of dismissing teachers perceived to be ineffective.
5. I strongly support a policy of positive racial attitudes in all school books and supporting materials. **
6. I strongly support a policy of making all pupils participate in team games.
7. I strongly support a policy of allowing pupils to opt out of school religious assemblies.
8. I strongly support a policy of allowing the Head teacher to make all the decisions relating to the day-to-day running of the school.
9. I strongly support a policy of allowing the community to decide how the school premises will be used out of normal school hours.
10. I strongly support a policy of allowing political attitudes to influence the funding of schools in areas of social deprivation.

** It was explained that 'positive racial attitudes' in this context referred to a deliberate intention to 'promote all races', irrespective of colour.

APPENDIX 12

FOR THE ATTENTION OF MR N C H VARNON

AUTHORITY RESPONSE: FIRST BATCH (54)

To assess how the IDENTIFICATION OF TRAINING NEEDS for governors and school staff has been carried out, in the columns marked 'Significance' please tick one box for each input which indicates how you perceive the input from the source categories suggested, adding any others in the spaces provided which are of relevance to your Authority.

(If the governor training needs have not yet been identified, or if the identification process is still progressing, it would be quite acceptable to record either 'Nil' or 'Low' in all of the boxes.)

SIGNIFICANCE:

IDENTIFICATION OF TRAINING NEEDS; SOURCE:	HIGH %	MEDIUM %	LOW %	NIL %
Questionnaire to Governors	18 33	10 18	8 15	18 33
Written requests from Governors	16 30	18 33	12 22	8 15
Verbal requests from Governors	18 33	26 48	8 15	2 4
Questionnaire to Headteachers	6 11	8 15	6 11	34 63
Written requests from Headteachers	11 20	12 22	14 26	17 31
Verbal requests from Headteachers	16 30	19 35	9 17	10 18
Written or verbal input from:				
LEA Officers responsible for training	32 59	16 30	2 4	4 7
Other LEA Officers	15 28	26 48	7 13	6 11
Advisers	11 20	26 48	13 24	4 7
Elected Members of the Council	11 20	11 20	17 31	15 28
Other LEAs	4 7	8 15	20 37	22 41
Universities/Polytechnics	0 0	5 9	11 20	38 70
Higher Education Colleges	0 0	6 11	11 20	37 69
Adult Education Institutions	2 4	9 17	12 22	31 57

	HIGH %	MEDIUM %	LOW %	NIL %
Church Authorities	<input type="text" value="4"/> 7	<input type="text" value="21"/> 39	<input type="text" value="15"/> 28	<input type="text" value="14"/> 26
PTA	<input type="text" value="2"/> 4	<input type="text" value="13"/> 24	<input type="text" value="12"/> 22	<input type="text" value="27"/> 50
Trade Unions	<input type="text" value="2"/> 4	<input type="text" value="7"/> 13	<input type="text" value="12"/> 22	<input type="text" value="33"/> 61
Commerce/Industry	<input type="text" value="0"/> 0	<input type="text" value="7"/> 13	<input type="text" value="8"/> 15	<input type="text" value="39"/> 72
National Association (e.g. of Governors and Managers)	<input type="text" value="10"/> 18	<input type="text" value="16"/> 30	<input type="text" value="17"/> 31	<input type="text" value="11"/> 20
DES Circulars/Welsh Office Circulars	<input type="text" value="12"/> 22	<input type="text" value="16"/> 30	<input type="text" value="18"/> 33	<input type="text" value="8"/> 15
Research Publications (e.g. NFER)	<input type="text" value="8"/> 15	<input type="text" value="14"/> 26	<input type="text" value="21"/> 39	<input type="text" value="11"/> 20
Regular Publications (e.g. TES, Education)	<input type="text" value="8"/> 15	<input type="text" value="22"/> 41	<input type="text" value="16"/> 30	<input type="text" value="8"/> 15
Others (please describe briefly):				
.....	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
.....	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
.....	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
.....	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
.....	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

To assess the priority placed on the IDENTIFIED TRAINING NEEDS, in the columns marked 'Priority' please tick one box for each training need to indicate how the categories suggested are being considered in terms of priority in the preparation and delivery of training, adding any other categories in the spaces provided which are of relevance to your Authority.

(If the governor training needs have not yet been identified, or if the identification process is still progressing, it would be quite acceptable to record either 'Nil' or 'Low' in all of the boxes.)

PRIORITY:

IDENTIFIED TRAINING NEEDS:

	HIGH %	MEDIUM %	LOW %	NIL %
1986, 1988 Act Details	<input type="text" value="46"/> 85	<input type="text" value="6"/> 11	<input type="text" value="2"/> 4	<input type="text" value="0"/> 0
National Curriculum	<input type="text" value="44"/> 81	<input type="text" value="8"/> 15	<input type="text" value="2"/> 4	<input type="text" value="0"/> 0
Finance and Budgeting	<input type="text" value="44"/> 81	<input type="text" value="8"/> 15	<input type="text" value="2"/> 4	<input type="text" value="0"/> 0
Building and Fabric Maintenance	<input type="text" value="7"/> 13	<input type="text" value="19"/> 35	<input type="text" value="23"/> 43	<input type="text" value="5"/> 9
Grounds Maintenance	<input type="text" value="1"/> 2	<input type="text" value="12"/> 22	<input type="text" value="32"/> 59	<input type="text" value="9"/> 17
Health/Sex Education	<input type="text" value="10"/> 18	<input type="text" value="22"/> 41	<input type="text" value="20"/> 37	<input type="text" value="2"/> 4
Governors and Staff Legal Responsibilities	<input type="text" value="41"/> 76	<input type="text" value="11"/> 20	<input type="text" value="2"/> 4	<input type="text" value="0"/> 0
Multi-Ethnic Education	<input type="text" value="15"/> 28	<input type="text" value="11"/> 20	<input type="text" value="17"/> 31	<input type="text" value="11"/> 20
Gifted and Special Needs Provision	<input type="text" value="11"/> 20	<input type="text" value="19"/> 35	<input type="text" value="22"/> 41	<input type="text" value="2"/> 4
Equal Opportunities	<input type="text" value="17"/> 31	<input type="text" value="15"/> 28	<input type="text" value="15"/> 28	<input type="text" value="7"/> 13
.....	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
.....	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
.....	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
.....	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

	HIGH %	MEDIUM %	LOW %	NIL %
General Management Skills	<input type="text" value="21"/> 39	<input type="text" value="18"/> 33	<input type="text" value="11"/> 20	<input type="text" value="4"/> 7
Communication Skills	<input type="text" value="12"/> 22	<input type="text" value="20"/> 37	<input type="text" value="17"/> 31	<input type="text" value="5"/> 9
Governing Body Procedures	<input type="text" value="27"/> 50	<input type="text" value="20"/> 37	<input type="text" value="7"/> 13	<input type="text" value="0"/> 0
Interviewing & Staff Selection Skills	<input type="text" value="43"/> 80	<input type="text" value="9"/> 17	<input type="text" value="2"/> 4	<input type="text" value="0"/> 0
Monitoring & Performance Indicator Skills	<input type="text" value="12"/> 22	<input type="text" value="14"/> 26	<input type="text" value="21"/> 39	<input type="text" value="7"/> 13
.....	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
.....	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
.....	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
.....	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Roles of Governors	<input type="text" value="38"/> 70	<input type="text" value="9"/> 17	<input type="text" value="4"/> 7	<input type="text" value="3"/> 6
Interaction with Other Governing Bodies	<input type="text" value="5"/> 9	<input type="text" value="12"/> 22	<input type="text" value="27"/> 50	<input type="text" value="10"/> 18
Interaction with Commerce & Industry	<input type="text" value="1"/> 2	<input type="text" value="12"/> 22	<input type="text" value="27"/> 50	<input type="text" value="14"/> 26
Governing Body/LEA/Central Government Relationships	<input type="text" value="15"/> 28	<input type="text" value="23"/> 43	<input type="text" value="12"/> 22	<input type="text" value="4"/> 7
.....	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
.....	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
.....	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
.....	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Others (please describe briefly) in the spaces provided (broadly divided into content, skills and procedures, roles within and beyond the school).

To assess whether the Governors, Headteachers and Senior Staff from the same schools are going to be trained together or whether other strategies are being developed, in the columns marked 'Preferred Method' please tick ONE box for each identified training need to indicate the preference expressed within your Authority.

PREFERRED METHOD:

COLUMN A: GOVERNORS BY THEMSELVES; HEADTEACHERS BY THEMSELVES

COLUMN B: GOVERNORS AND HEADTEACHERS TOGETHER

COLUMN C: GOVERNORS BY THEMSELVES; HEADTEACHER AND SENIOR STAFF TOGETHER

COLUMN D: GOVERNORS AND HEADTEACHERS AND SENIOR STAFF TOGETHER

COLUMN E: NO PREFERRED METHOD EXPRESSED

Note: If you have added other IDENTIFIED TRAINING NEEDS categories, please indicate the PREFERRED METHOD for these as well.

Note: If there has emerged a marked difference in the PREFERRED METHOD for training Governors and Headteachers and Senior Staff of primary and secondary schools, you can indicate this by adding a letter to the boxes which you have ticked.

PRIMARY/MIDDLE SCHOOLS (P)
SECONDARY SCHOOLS (S)
SIXTH FORM COLLEGES (C)

Example Response:

	A	B	C	D	E
Finance and Budgeting	<input checked="" type="checkbox"/> s	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> p	<input type="checkbox"/>

PREFERRED METHOD:

IDENTIFIED TRAINING NEEDS

	A %	B %	C %	D %	E %
1986,1988 Act Details	<input type="text"/> 18 33	<input type="text"/> 11 20	<input type="text"/> 10 18	<input type="text"/> 5 9	<input type="text"/> 10 18
National Curriculum	<input type="text"/> 19 35	<input type="text"/> 8 15	<input type="text"/> 12 22	<input type="text"/> 4 7	<input type="text"/> 11 20
Finance and Budgeting	<input type="text"/> 7 13	<input type="text"/> 16 30	<input type="text"/> 11 20	<input type="text"/> 9 17	<input type="text"/> 11 20
Building & Fabric Maintenance	<input type="text"/> 5 9	<input type="text"/> 9 17	<input type="text"/> 8 15	<input type="text"/> 5 9	<input type="text"/> 27 50
Grounds Maintenance	<input type="text"/> 3 6	<input type="text"/> 8 15	<input type="text"/> 8 15	<input type="text"/> 2 4	<input type="text"/> 33 61
Health/Sex Education	<input type="text"/> 6 11	<input type="text"/> 16 30	<input type="text"/> 8 15	<input type="text"/> 8 15	<input type="text"/> 16 30
Governors & Staff Legal Responsibilities	<input type="text"/> 14 26	<input type="text"/> 12 22	<input type="text"/> 9 17	<input type="text"/> 8 15	<input type="text"/> 11 20
Multi-Ethnic Education	<input type="text"/> 10 18	<input type="text"/> 6 11	<input type="text"/> 9 17	<input type="text"/> 5 9	<input type="text"/> 24 44

	A %	B %	C %	D %	E %
Gifted & Special Needs Provision	<input type="text" value="13"/> 24	<input type="text" value="7"/> 13	<input type="text" value="8"/> 15	<input type="text" value="3"/> 6	<input type="text" value="23"/> 43
Equal Opportunities	<input type="text" value="11"/> 20	<input type="text" value="8"/> 15	<input type="text" value="9"/> 17	<input type="text" value="8"/> 15	<input type="text" value="18"/> 33
.....	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
.....	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
.....	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
General Management Skills	<input type="text" value="16"/> 30	<input type="text" value="9"/> 17	<input type="text" value="9"/> 17	<input type="text" value="5"/> 9	<input type="text" value="15"/> 28
Communication Skills	<input type="text" value="15"/> 28	<input type="text" value="7"/> 13	<input type="text" value="8"/> 15	<input type="text" value="3"/> 6	<input type="text" value="21"/> 39
Governing Body Procedures	<input type="text" value="15"/> 28	<input type="text" value="14"/> 26	<input type="text" value="12"/> 22	<input type="text" value="3"/> 6	<input type="text" value="10"/> 18
Interviewing & Staff Selection Skills	<input type="text" value="15"/> 28	<input type="text" value="13"/>	<input type="text" value="10"/> 18	<input type="text" value="5"/> 9	<input type="text" value="11"/> 20
Monitoring & Performance Indicator Skills	<input type="text" value="7"/>	<input type="text" value="9"/> 17	<input type="text" value="8"/> 15	<input type="text" value="3"/> 6	<input type="text" value="27"/> 50
.....	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
.....	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
.....	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Roles of Governors	<input type="text" value="19"/>	<input type="text" value="14"/> 26	<input type="text" value="7"/> 13	<input type="text" value="2"/> 4	<input type="text" value="12"/> 22
Interaction with Other Governing Bodies	<input type="text" value="9"/> 17	<input type="text" value="6"/> 11	<input type="text" value="6"/> 11	<input type="text" value="1"/> 2	<input type="text" value="32"/> 59
Interaction with Commerce and Industry	<input type="text" value="6"/> 11	<input type="text" value="6"/> 11	<input type="text" value="6"/> 11	<input type="text" value="4"/> 7	<input type="text" value="32"/> 59
Governing Body/LEA/Central Government Relationships	<input type="text" value="11"/> 20	<input type="text" value="15"/> 28	<input type="text" value="5"/> 9	<input type="text" value="2"/> 4	<input type="text" value="21"/> 39
.....	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
.....	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
.....	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Others (please describe briefly) in the spaces provided (broadly divided into content, skills and procedures, roles within and beyond the school).					

To assess the METHOD OF TRAINING DELIVERY (PERSONNEL) in the columns marked 'Significance' please tick ONE box for each of the delivery personnel suggested, adding any other categories of personnel that may be of relevance to your Authority.

(If the training delivery has not yet been structured or is in its early stages it would be quite acceptable to record 'Not yet used' or 'Low' in all of the boxes).

METHOD OF TRAINING DELIVERY (PERSONNEL):	SIGNIFICANCE:			
	HIGH %	MEDIUM %	LOW %	NOT YET USED %
LEA Officers responsible for training	<input checked="" type="checkbox"/> 36 67	<input checked="" type="checkbox"/> 10 18	<input checked="" type="checkbox"/> 3 6	<input checked="" type="checkbox"/> 5 9
Advisers	<input checked="" type="checkbox"/> 22 41	<input checked="" type="checkbox"/> 16 30	<input checked="" type="checkbox"/> 9 17	<input checked="" type="checkbox"/> 7 13
University/Polytechnic staff	<input type="checkbox"/> 1 2	<input checked="" type="checkbox"/> 4 7	<input checked="" type="checkbox"/> 12 22	<input checked="" type="checkbox"/> 37 69
Higher Education staff	<input checked="" type="checkbox"/> 2 4	<input checked="" type="checkbox"/> 3 6	<input checked="" type="checkbox"/> 10 18	<input checked="" type="checkbox"/> 39 72
Adult Education staff	<input checked="" type="checkbox"/> 7 13	<input checked="" type="checkbox"/> 9 17	<input checked="" type="checkbox"/> 9 17	<input checked="" type="checkbox"/> 29 54
Other Community tutors (part-time, occasional tutors)	<input checked="" type="checkbox"/> 6 11	<input checked="" type="checkbox"/> 7 13	<input checked="" type="checkbox"/> 5 9	<input checked="" type="checkbox"/> 36 67
Headteachers/School staff	<input checked="" type="checkbox"/> 14 26	<input checked="" type="checkbox"/> 18 33	<input checked="" type="checkbox"/> 9 17	<input checked="" type="checkbox"/> 13 24
Governors	<input checked="" type="checkbox"/> 11 20	<input checked="" type="checkbox"/> 16 30	<input checked="" type="checkbox"/> 11 20	<input checked="" type="checkbox"/> 16 30
Church Tutors	<input checked="" type="checkbox"/> 3 6	<input checked="" type="checkbox"/> 9 17	<input checked="" type="checkbox"/> 15 28	<input checked="" type="checkbox"/> 27 50
Commerce/Professions training staff	<input checked="" type="checkbox"/> 1 2	<input checked="" type="checkbox"/> 3 6	<input checked="" type="checkbox"/> 7 13	<input checked="" type="checkbox"/> 43 80
Education Consultants	<input checked="" type="checkbox"/> 3 6	<input checked="" type="checkbox"/> 2 4	<input checked="" type="checkbox"/> 10 18	<input checked="" type="checkbox"/> 39 72
Others (please describe briefly):				
.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

To assess the METHOD OF TRAINING DELIVERY (MATERIALS) in the columns marked 'Significance' please tick ONE box for each of the delivery materials suggested, adding any other categories of materials that may be of relevance to your Authority.

(If the training delivery has not yet been structured or is in its early stages it would be quite acceptable to record 'Not yet used' or 'Low' in all of the boxes).

METHOD OF TRAINING DELIVERY (MATERIALS):	SIGNIFICANCE:			NOT YET USED
	HIGH	MEDIUM	LOW	
Materials produced by:				
LEA staff	<input type="checkbox"/> 43 80	<input type="checkbox"/> 6 11	<input type="checkbox"/> 4 7	<input type="checkbox"/> 1 2
University/Polytechnic staff	<input type="checkbox"/> 2 4	<input type="checkbox"/> 2 4	<input type="checkbox"/> 11 20	<input type="checkbox"/> 39 72
Higher Education staff	<input type="checkbox"/> 1 2	<input type="checkbox"/> 2 4	<input type="checkbox"/> 9 17	<input type="checkbox"/> 42 78
Adult Education staff	<input type="checkbox"/> 6 11	<input type="checkbox"/> 4 7	<input type="checkbox"/> 8 15	<input type="checkbox"/> 36 67
Community Tutors	<input type="checkbox"/> 2 4	<input type="checkbox"/> 2 4	<input type="checkbox"/> 8 15	<input type="checkbox"/> 42 78
Headteachers/School staff	<input type="checkbox"/> 12 22	<input type="checkbox"/> 12 22	<input type="checkbox"/> 14 26	<input type="checkbox"/> 16 30
Governors	<input type="checkbox"/> 5 9	<input type="checkbox"/> 10 18	<input type="checkbox"/> 11 20	<input type="checkbox"/> 28 52
Church Tutors	<input type="checkbox"/> 3 6	<input type="checkbox"/> 8 15	<input type="checkbox"/> 12 22	<input type="checkbox"/> 31 57
Commerce/Professions training staff	<input type="checkbox"/> 0 0	<input type="checkbox"/> 2 4	<input type="checkbox"/> 8 15	<input type="checkbox"/> 44 81
LMS Initiative Training Package	<input type="checkbox"/> 22 41	<input type="checkbox"/> 15 28	<input type="checkbox"/> 6 11	<input type="checkbox"/> 11 20
Education Consultants	<input type="checkbox"/> 3 6	<input type="checkbox"/> 7 13	<input type="checkbox"/> 6 11	<input type="checkbox"/> 38 70
Open University	<input type="checkbox"/> 14 26	<input type="checkbox"/> 16 30	<input type="checkbox"/> 13 24	<input type="checkbox"/> 11 20
BBC/Local Radio/TV material	<input type="checkbox"/> 5 9	<input type="checkbox"/> 14 26	<input type="checkbox"/> 13 24	<input type="checkbox"/> 22 41
Independent Radio/TV material	<input type="checkbox"/> 2 4	<input type="checkbox"/> 0 0	<input type="checkbox"/> 8 15	<input type="checkbox"/> 44 81
National Associations (eg NAGM)	<input type="checkbox"/> 16 30	<input type="checkbox"/> 16 30	<input type="checkbox"/> 7 13	<input type="checkbox"/> 15 28
Other (please describe briefly):				
.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

To assess the METHOD OF TRAINING DELIVERY (GEOGRAPHICAL) please tick the box in column marked 'Main Strategy' the ONE description which best describes the Authority approach, adding your own strategy description if those offered are inadequate.

METHOD OF TRAINING DELIVERY (GEOGRAPHICAL):	(Tick): MAIN STRATEGY:	%
Single Governing Bodies/School Staff	<input checked="" type="checkbox"/> 4	7
Clustered Governing Bodies/School Staff (feeder primary with secondary	<input checked="" type="checkbox"/> 6	11
Clustered Governing Bodies/School Staff (urban/rural areas)	<input checked="" type="checkbox"/> 4	7
Clustered Governing Bodies/School Staff (Education Area Offices)	<input checked="" type="checkbox"/> 6	11
Open to all Governing Bodies/School Staff based on urban/rural centres	<input checked="" type="checkbox"/> 11	20
Open to all Governing Bodies/School Staff based on Education Area Offices	<input checked="" type="checkbox"/> 6	11
Open to all Governing Bodies/School Staff based on institution locations (eg university, college)	<input checked="" type="checkbox"/> 6	11
Other (please describe ONE briefly):		
.....	<input checked="" type="checkbox"/> 3	6
No Geographical Strategy has been developed yet	<input checked="" type="checkbox"/> 3	6
No Geographical Strategy is necessary in this Authority	<input checked="" type="checkbox"/> 5	9

To assess how much time has been given to IDENTIFICATION OF NEEDS, the METHOD OF TRAINING DELIVERY (PERSONNEL), (MATERIALS), (GEOGRAPHICAL) please tick in the column marked 'Years' the ONE box which represents the amount of time which has been spent in preparing to train for the new responsibilities under the 1986 and 1988 Acts.

Time given to training (Tick) YEARS

Less than ½ year	<input checked="" type="checkbox"/> 15	28%
½ to 1 year	<input checked="" type="checkbox"/> 18	33
1 to 1½ years	<input checked="" type="checkbox"/> 9	17
1½ to 2 years	<input checked="" type="checkbox"/> 5	9
2 to 2½ years	<input checked="" type="checkbox"/> 3	6
2½ to 3 years	<input checked="" type="checkbox"/> 2	4
More than 3 years	<input checked="" type="checkbox"/> 2	4

To assess how you perceive the current phase in preparing and delivering training for Governors (and Headteachers/Senior Staff) how would you describe your Authority:

TICK ONE BOX:

Identification of needs and general planning phase	<input checked="" type="checkbox"/> 5	9%
Planning details of the introductory training phase	<input checked="" type="checkbox"/> 9	17
Delivering the introductory training phase	<input checked="" type="checkbox"/> 12	22
Assessment of introductory training phase	<input checked="" type="checkbox"/> 3	6
Planning details of the secondary phase	<input checked="" type="checkbox"/> 20	37
Other (please describe briefly):	<input checked="" type="checkbox"/> 5	9

APPENDIX 13

FOR THE ATTENTION OF MR N C H VARNON

AUTHORITY RESPONSE: SECOND BATCH (7)

To assess how the IDENTIFICATION OF TRAINING NEEDS for governors and school staff has been carried out, in the columns marked 'Significance' please tick one box for each input which indicates how you perceive the input from the source categories suggested, adding any others in the spaces provided which are of relevance to your Authority.

(If the governor training needs have not yet been identified, or if the identification process is still progressing, it would be quite acceptable to record either 'Nil' or 'Low' in all of the boxes.)

SIGNIFICANCE:

IDENTIFICATION OF TRAINING NEEDS; SOURCE:	HIGH	MEDIUM	LOW	NIL
Questionnaire to Governors	<input type="text" value="3"/>	<input type="text" value="1"/>	<input type="text" value="0"/>	<input type="text" value="3"/>
Written requests from Governors	<input type="text" value="3"/>	<input type="text" value="1"/>	<input type="text" value="2"/>	<input type="text" value="1"/>
Verbal requests from Governors	<input type="text" value="3"/>	<input type="text" value="3"/>	<input type="text" value="0"/>	<input type="text" value="1"/>
Questionnaire to Headteachers	<input type="text" value="1"/>	<input type="text" value="2"/>	<input type="text" value="0"/>	<input type="text" value="4"/>
Written requests from Headteachers	<input type="text" value="1"/>	<input type="text" value="4"/>	<input type="text" value="1"/>	<input type="text" value="1"/>
Verbal requests from Headteachers	<input type="text" value="1"/>	<input type="text" value="4"/>	<input type="text" value="1"/>	<input type="text" value="1"/>
Written or verbal input from:				
LEA Officers responsible for training	<input type="text" value="5"/>	<input type="text" value="2"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
Other LEA Officers	<input type="text" value="1"/>	<input type="text" value="5"/>	<input type="text" value="1"/>	<input type="text" value="0"/>
Advisers	<input type="text" value="1"/>	<input type="text" value="4"/>	<input type="text" value="2"/>	<input type="text" value="0"/>
Elected Members of the Council	<input type="text" value="0"/>	<input type="text" value="2"/>	<input type="text" value="2"/>	<input type="text" value="3"/>
Other LEAs	<input type="text" value="0"/>	<input type="text" value="2"/>	<input type="text" value="2"/>	<input type="text" value="3"/>
Universities/Polytechnics	<input type="text" value="0"/>	<input type="text" value="1"/>	<input type="text" value="1"/>	<input type="text" value="5"/>
Higher Education Colleges	<input type="text" value="0"/>	<input type="text" value="1"/>	<input type="text" value="1"/>	<input type="text" value="5"/>
Adult Education Institutions	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="3"/>	<input type="text" value="4"/>

	HIGH	MEDIUM	LOW	NIL
Church Authorities	1	2	2	2
PTA	0	0	4	3
Trade Unions	0	1	1	5
Commerce/Industry	0	0	1	6
National Association (e.g. of Governors and Managers)	1	2	2	2
DES Circulars/Welsh Office Circulars	1	3	1	2
Research Publications (e.g. NFER)	2	1	1	3
Regular Publications (e.g. TES, Education)	1	3	0	3
Others (please describe briefly):				
.....				
.....				
.....				
.....				
.....				

To assess the priority placed on the IDENTIFIED TRAINING NEEDS, in the columns marked 'Priority' please tick one box for each training need to indicate how the categories suggested are being considered in terms of priority in the preparation and delivery of training, adding any other categories in the spaces provided which are of relevance to your Authority.

(If the governor training needs have not yet been identified, or if the identification process is still progressing, it would be quite acceptable to record either 'Nil' or 'Low' in all of the boxes.)

PRIORITY:

IDENTIFIED TRAINING NEEDS:	HIGH	MEDIUM	LOW	NIL
1986, 1988 Act Details	<input type="text" value="5"/>	<input type="text" value="1"/>	<input type="text" value="1"/>	<input type="text" value="0"/>
National Curriculum	<input type="text" value="4"/>	<input type="text" value="3"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
Finance and Budgeting	<input type="text" value="7"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
Building and Fabric Maintenance	<input type="text" value="0"/>	<input type="text" value="3"/>	<input type="text" value="3"/>	<input type="text" value="1"/>
Grounds Maintenance	<input type="text" value="0"/>	<input type="text" value="1"/>	<input type="text" value="2"/>	<input type="text" value="4"/>
Health/Sex Education	<input type="text" value="0"/>	<input type="text" value="5"/>	<input type="text" value="1"/>	<input type="text" value="1"/>
Governors and Staff Legal Responsibilities	<input type="text" value="3"/>	<input type="text" value="2"/>	<input type="text" value="2"/>	<input type="text" value="0"/>
Multi-Ethnic Education	<input type="text" value="0"/>	<input type="text" value="5"/>	<input type="text" value="1"/>	<input type="text" value="1"/>
Gifted and Special Needs Provision	<input type="text" value="0"/>	<input type="text" value="6"/>	<input type="text" value="1"/>	<input type="text" value="0"/>
Equal Opportunities	<input type="text" value="0"/>	<input type="text" value="5"/>	<input type="text" value="1"/>	<input type="text" value="1"/>
.....	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
.....	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
.....	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
.....	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

	HIGH	MEDIUM	LOW	NIL
General Management Skills	1	5	1	0
Communication Skills	0	4	3	0
Governing Body Procedures	3	3	1	0
Interviewing & Staff Selection Skills	4	2	1	0
Monitoring & Performance Indicator Skills	2	0	3	2
.....				
.....				
.....				
.....				
Roles of Governors	5	1	1	0
Interaction with Other Governing Bodies	0	1	4	2
Interaction with Commerce & Industry	0	1	2	4
Governing Body/LEA/Central Government Relationships	3	2	2	0
.....				
.....				
.....				
.....				

Others (please describe briefly) in the spaces provided (broadly divided into content, skills and procedures, roles within and beyond the school).

To assess whether the Governors, Headteachers and Senior Staff from the same schools are going to be trained together or whether other strategies are being developed, in the columns marked 'Preferred Method' please tick ONE box for each identified training need to indicate the preference expressed within your Authority.

PREFERRED METHOD:

COLUMN A: GOVERNORS BY THEMSELVES; HEADTEACHERS BY THEMSELVES

COLUMN B: GOVERNORS AND HEADTEACHERS TOGETHER

COLUMN C: GOVERNORS BY THEMSELVES; HEADTEACHER AND SENIOR STAFF TOGETHER

COLUMN D: GOVERNORS AND HEADTEACHERS AND SENIOR STAFF TOGETHER

COLUMN E: NO PREFERRED METHOD EXPRESSED

Note: If you have added other IDENTIFIED TRAINING NEEDS categories, please indicate the PREFERRED METHOD for these as well.

Note: If there has emerged a marked difference in the PREFERRED METHOD for training Governors and Headteachers and Senior Staff of primary and secondary schools, you can indicate this by adding a letter to the boxes which you have ticked.

PRIMARY/MIDDLE SCHOOLS (P)
SECONDARY SCHOOLS (S)
SIXTH FORM COLLEGES (C)

Example Response:

	A	B	C	D	E
Finance and Budgeting	<input checked="" type="checkbox"/> s	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> p	<input type="checkbox"/>

PREFERRED METHOD:

IDENTIFIED TRAINING NEEDS	A	B	C	D	E
1986,1988 Act Details	<input type="checkbox"/> 2	<input type="checkbox"/> 4	<input type="checkbox"/> 0	<input type="checkbox"/> 0	<input type="checkbox"/> 1
National Curriculum	<input type="checkbox"/> 3	<input type="checkbox"/> 3	<input type="checkbox"/> 0	<input type="checkbox"/> 1	<input type="checkbox"/> 0
Finance and Budgeting	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1	<input type="checkbox"/> 1	<input type="checkbox"/> 0
Building & Fabric Maintenance	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 1	<input type="checkbox"/> 1	<input type="checkbox"/> 2
Grounds Maintenance	<input type="checkbox"/> 1	<input type="checkbox"/> 1	<input type="checkbox"/> 1	<input type="checkbox"/> 1	<input type="checkbox"/> 3
Health/Sex Education	<input type="checkbox"/> 3	<input type="checkbox"/> 1	<input type="checkbox"/> 0	<input type="checkbox"/> 1	<input type="checkbox"/> 2
Governors & Staff Legal Responsibilities	<input type="checkbox"/> 2	<input type="checkbox"/> 4	<input type="checkbox"/> 0	<input type="checkbox"/> 0	<input type="checkbox"/> 1
Multi-Ethnic Education	<input type="checkbox"/> 2	<input type="checkbox"/> 2	<input type="checkbox"/> 1	<input type="checkbox"/> 0	<input type="checkbox"/> 2

	A	B	C	D	E
Gifted & Special Needs Provision	4	0	2	0	1
Equal Opportunities	3	2	0	0	2
.....					
.....					
.....					
General Management Skills	3	1	0	1	2
Communication Skills	3	2	0	1	1
Governing Body Procedures	3	3	0	1	0
Interviewing & Staff Selection Skills	3	3	0	1	0
Monitoring & Performance Indicator Skills	2	2	1	1	1
.....					
.....					
.....					
Roles of Governors	4	2	0	1	0
Interaction with Other Governing Bodies	2	0	0	0	5
Interaction with Commerce and Industry	3	0	0	0	4
Governing Body/LEA/Central Government Relationships	3	1	0	0	3
.....					
.....					
.....					

Others (please describe briefly) in the spaces provided (broadly divided into content, skills and procedures, roles within and beyond the school).

To assess the METHOD OF TRAINING DELIVERY (PERSONNEL) in the columns marked 'Significance' please tick ONE box for each of the delivery personnel suggested, adding any other categories of personnel that may be of relevance to your Authority.

(If the training delivery has not yet been structured or is in its early stages it would be quite acceptable to record 'Not yet used' or 'Low' in all of the boxes).

METHOD OF TRAINING DELIVERY (PERSONNEL):	SIGNIFICANCE:			
	HIGH	MEDIUM	LOW	NOT YET USED
LEA Officers responsible for training	<input type="checkbox"/> 5	<input type="checkbox"/> 2	<input type="checkbox"/> 0	<input type="checkbox"/> 0
Advisers	<input type="checkbox"/> 3	<input type="checkbox"/> 3	<input type="checkbox"/> 1	<input type="checkbox"/> 0
University/Polytechnic staff	<input type="checkbox"/> 0	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 4
Higher Education staff	<input type="checkbox"/> 0	<input type="checkbox"/> 0	<input type="checkbox"/> 2	<input type="checkbox"/> 5
Adult Education staff	<input type="checkbox"/> 1	<input type="checkbox"/> 0	<input type="checkbox"/> 2	<input type="checkbox"/> 4
Other Community tutors (part-time, occasional tutors)	<input type="checkbox"/> 1	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3
Headteachers/School staff	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 0	<input type="checkbox"/> 2
Governors	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 2	<input type="checkbox"/> 2
Church Tutors	<input type="checkbox"/> 2	<input type="checkbox"/> 0	<input type="checkbox"/> 0	<input type="checkbox"/> 5
Commerce/Professions training staff	<input type="checkbox"/> 0	<input type="checkbox"/> 0	<input type="checkbox"/> 0	<input type="checkbox"/> 7
Education Consultants	<input type="checkbox"/> 0	<input type="checkbox"/> 1	<input type="checkbox"/> 0	<input type="checkbox"/> 6
Others (please describe briefly):				
.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

To assess the METHOD OF TRAINING DELIVERY (MATERIALS) in the columns marked 'Significance' please tick ONE box for each of the delivery materials suggested, adding any other categories of materials that may be of relevance to your Authority.

(If the training delivery has not yet been structured or is in its early stages it would be quite acceptable to record 'Not yet used' or 'Low' in all of the boxes).

METHOD OF TRAINING DELIVERY (MATERIALS):	SIGNIFICANCE:			NOT YET USED
	HIGH	MEDIUM	LOW	
Materials produced by:				
LEA staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
University/Polytechnic staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Higher Education staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Adult Education staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Community Tutors	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Headteachers/School staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Governors	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Church Tutors	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Commerce/Professions training staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
LMS Initiative Training Package	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Education Consultants	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Open University	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
BBC/Local Radio/TV material	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Independent Radio/TV material	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
National Associations (eg NAGM)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other (please describe briefly):				
.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

To assess the METHOD OF TRAINING DELIVERY (GEOGRAPHICAL) please tick the box in column marked 'Main Strategy' the ONE description which best describes the Authority approach, adding your own strategy description if those offered are inadequate.

METHOD OF TRAINING DELIVERY (GEOGRAPHICAL):

(Tick): MAIN STRATEGY:

Single Governing Bodies/School Staff	<input type="checkbox"/>
Clustered Governing Bodies/School Staff (feeder primary with secondary	<input checked="" type="checkbox"/>
Clustered Governing Bodies/School Staff (urban/rural areas)	<input type="checkbox"/>
Clustered Governing Bodies/School Staff (Education Area Offices)	<input checked="" type="checkbox"/>
Open to all Governing Bodies/School Staff based on urban/rural centres	<input type="checkbox"/>
Open to all Governing Bodies/School Staff based on Education Area Offices	<input type="checkbox"/>
Open to all Governing Bodies/School Staff based on institution locations (eg university, college)	<input type="checkbox"/>
Other (please describe ONE briefly):	
.....	<input checked="" type="checkbox"/>
No Geographical Strategy has been developed yet	<input checked="" type="checkbox"/>
No Geographical Strategy is necessary in this Authority	<input checked="" type="checkbox"/>

To assess how much time has been given to IDENTIFICATION OF NEEDS, the METHOD OF TRAINING DELIVERY (PERSONNEL), (MATERIALS), (GEOGRAPHICAL) please tick in the column marked 'Years' the ONE box which represents the amount of time which has been spent in preparing to train for the new responsibilities under the 1986 and 1988 Acts.

Time given to training (Tick) YEARS

Less than ½ year	<input checked="" type="checkbox"/> 3
½ to 1 year	<input type="checkbox"/> 1
1 to 1½ years	<input type="checkbox"/> 1
1½ to 2 years	<input type="checkbox"/> 1
2 to 2½ years	<input type="checkbox"/>
2½ to 3 years	<input type="checkbox"/>
More than 3 years	<input type="checkbox"/> 1

To assess how you perceive the current phase in preparing and delivering training for Governors (and Headteachers/Senior Staff) how would you describe your Authority:

TICK ONE BOX:

Identification of needs and general planning phase	<input type="checkbox"/>
Planning details of the introductory training phase	<input checked="" type="checkbox"/> 2
Delivering the introductory training phase	<input type="checkbox"/> 1
Assessment of introductory training phase	<input type="checkbox"/> 1
Planning details of the secondary phase	<input checked="" type="checkbox"/> 3
Other (please describe briefly):	
.....	<input type="checkbox"/>

APPENDIX 14

FOR THE ATTENTION OF MR N C H VARNON

AUTHORITY RESPONSE: 61 AUTHORITIES

To assess how the IDENTIFICATION OF TRAINING NEEDS for governors and school staff has been carried out, in the columns marked 'Significance' please tick one box for each input which indicates how you perceive the input from the source categories suggested, adding any others in the spaces provided which are of relevance to your Authority.

(If the governor training needs have not yet been identified, or if the identification process is still progressing, it would be quite acceptable to record either 'Nil' or 'Low' in all of the boxes.)

SIGNIFICANCE:

IDENTIFICATION OF TRAINING NEEDS; SOURCE:	HIGH %	MEDIUM %	LOW %	NIL %
Questionnaire to Governors	21 34	11 18	8 13	21 34
Written requests from Governors	19 31	19 31	14 23	9 15
Verbal requests from Governors	21 34	29 48	8 13	3 5
Questionnaire to Headteachers	7 11	10 16	6 10	38 62
Written requests from Headteachers	12 20	16 26	15 25	18 30
Verbal requests from Headteachers	17 28	23 38	10 16	11 18
Written or verbal input from:				
LEA Officers responsible for training	37 61	18 30	2 3	4 7
Other LEA Officers	16 26	31 51	8 13	6 10
Advisers	12 20	30 49	15 25	4 7
Elected Members of the Council	11 18	13 21	19 31	18 30
Other LEAs	4 7	10 16	22 36	25 41
Universities/Polytechnics	0 0	6 10	12 20	43 70
Higher Education Colleges	0 0	7 11	12 20	42 69
Adult Education Institutions	2 3	9 15	15 25	35 57

	HIGH %	MEDIUM %	LOW %	NIL %
Church Authorities	5 8	23 38	17 28	16 26
PTA	2 3	13 21	16 26	30 49
Trade Unions	2 3	8 13	13 21	38 62
Commerce/Industry	0 0	7 11	9 15	45 74
National Association (e.g. of Governors and Managers)	11 18	18 30	19 31	13 21
DES Circulars/Welsh Office Circulars	13 21	19 31	19 31	10 16
Research Publications (e.g. NFER)	10 16	15 25	22 36	14 23
Regular Publications (e.g. TES, Education)	9 15	25 41	16 26	11 18
Others (please describe briefly):				
.....				
.....				
.....				
.....				
.....				

To assess the priority placed on the IDENTIFIED TRAINING NEEDS, in the columns marked 'Priority' please tick one box for each training need to indicate how the categories suggested are being considered in terms of priority in the preparation and delivery of training, adding any other categories in the spaces provided which are of relevance to your Authority.

(If the governor training needs have not yet been identified, or if the identification process is still progressing, it would be quite acceptable to record either 'Nil' or 'Low' in all of the boxes.)

PRIORITY:

IDENTIFIED TRAINING NEEDS:

	HIGH %	MEDIUM %	LOW %	NIL %
1986, 1988 Act Details	51 84	7 11	3 5	0 0
National Curriculum	48 79	11 18	2 3	0 0
Finance and Budgeting	51 84	8 13	2 3	0 0
Building and Fabric Maintenance	7 11	22 36	26 43	6 10
Grounds Maintenance	1 2	13 21	34 56	13 21
Health/Sex Education	10 16	27 44	21 34	3 5
Governors and Staff Legal Responsibilities	44 72	13 21	4 7	0 0
Multi-Ethnic Education	15 25	16 26	18 30	12 20
Gifted and Special Needs Provision	11 18	25 41	23 38	2 3
Equal Opportunities	17 28	20 33	16 26	8 13
.....				
.....				
.....				
.....				

	HIGH %	MEDIUM %	LOW %	NIL %
General Management Skills	22 36	23 38	12 20	4 7
Communication Skills	12 20	24 39	20 33	5 8
Governing Body Procedures	30 49	23 38	8 13	0 0
Interviewing & Staff Selection Skills	47 77	11 18	3 5	0 0
Monitoring & Performance Indicator Skills	14 23	14 23	24 39	9 15
.....				
.....				
.....				
.....				
Roles of Governors	43 70	10 16	5 8	3 5
Interaction with Other Governing Bodies	5 8	13 21	31 51	12 20
Interaction with Commerce & Industry	1 2	13 21	29 48	18 30
Governing Body/LEA/Central Government Relationships	18 30	25 41	14 23	4 7
.....				
.....				
.....				
.....				

Others (please describe briefly) in the spaces provided (broadly divided into content, skills and procedures, roles within and beyond the school).

To assess whether the Governors, Headteachers and Senior Staff from the same schools are going to be trained together or whether other strategies are being developed, in the columns marked 'Preferred Method' please tick ONE box for each identified training need to indicate the preference expressed within your Authority.

PREFERRED METHOD:

COLUMN A: GOVERNORS BY THEMSELVES; HEADTEACHERS BY THEMSELVES

COLUMN B: GOVERNORS AND HEADTEACHERS TOGETHER

COLUMN C: GOVERNORS BY THEMSELVES; HEADTEACHER AND SENIOR STAFF TOGETHER

COLUMN D: GOVERNORS AND HEADTEACHERS AND SENIOR STAFF TOGETHER

COLUMN E: NO PREFERRED METHOD EXPRESSED

Note: If you have added other IDENTIFIED TRAINING NEEDS categories, please indicate the PREFERRED METHOD for these as well.

Note: If there has emerged a marked difference in the PREFERRED METHOD for training Governors and Headteachers and Senior Staff of primary and secondary schools, you can indicate this by adding a letter to the boxes which you have ticked.

PRIMARY/MIDDLE SCHOOLS (P)
SECONDARY SCHOOLS (S)
SIXTH FORM COLLEGES (C)

Example Response:

	A	B	C	D	E
Finance and Budgeting	<input checked="" type="checkbox"/> s	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> p	<input type="checkbox"/>

PREFERRED METHOD:

IDENTIFIED TRAINING NEEDS	A %	B %	C %	D %	E %
1986,1988 Act Details	<input type="text" value="20"/> 33	<input type="text" value="15"/> 25	<input type="text" value="10"/> 16	<input type="text" value="5"/> 8	<input type="text" value="11"/> 18
National Curriculum	<input type="text" value="22"/> 36	<input type="text" value="11"/> 18	<input type="text" value="12"/> 20	<input type="text" value="5"/> 8	<input type="text" value="11"/> 18
Finance and Budgeting	<input type="text" value="10"/> 16	<input type="text" value="18"/> 30	<input type="text" value="12"/> 20	<input type="text" value="10"/> 16	<input type="text" value="11"/> 18
Building & Fabric Maintenance	<input type="text" value="6"/> 10	<input type="text" value="11"/> 18	<input type="text" value="9"/> 15	<input type="text" value="6"/> 10	<input type="text" value="29"/> 48
Grounds Maintenance	<input type="text" value="4"/> 7	<input type="text" value="9"/> 15	<input type="text" value="9"/> 15	<input type="text" value="3"/> 5	<input type="text" value="36"/> 59
Health/Sex Education	<input type="text" value="9"/> 15	<input type="text" value="17"/> 28	<input type="text" value="8"/> 13	<input type="text" value="9"/> 15	<input type="text" value="18"/> 30
Governors & Staff Legal Responsibilities	<input type="text" value="16"/> 26	<input type="text" value="16"/> 26	<input type="text" value="9"/> 15	<input type="text" value="8"/> 13	<input type="text" value="12"/> 20
Multi-Ethnic Education	<input type="text" value="12"/> 20	<input type="text" value="8"/> 13	<input type="text" value="10"/> 16	<input type="text" value="5"/> 8	<input type="text" value="26"/> 43

	A %	B %	C %	D %	E %
Gifted & Special Needs Provision	<input type="text" value="17"/> 28	<input type="text" value="7"/> 11	<input type="text" value="10"/> 14	<input type="text" value="3"/> 5	<input type="text" value="24"/> 39
Equal Opportunities	<input type="text" value="14"/> 23	<input type="text" value="10"/> 16	<input type="text" value="9"/> 15	<input type="text" value="8"/> 13	<input type="text" value="20"/> 33
.....	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
.....	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
.....	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
General Management Skills	<input type="text" value="19"/> 31	<input type="text" value="10"/> 16	<input type="text" value="9"/> 15	<input type="text" value="6"/> 10	<input type="text" value="17"/> 28
Communication Skills	<input type="text" value="18"/> 30	<input type="text" value="9"/> 15	<input type="text" value="8"/> 13	<input type="text" value="4"/> 7	<input type="text" value="22"/> 36
Governing Body Procedures	<input type="text" value="18"/> 30	<input type="text" value="17"/> 28	<input type="text" value="12"/> 20	<input type="text" value="4"/> 7	<input type="text" value="10"/> 16
Interviewing & Staff Selection Skills	<input type="text" value="18"/> 30	<input type="text" value="16"/> 26	<input type="text" value="10"/> 16	<input type="text" value="6"/> 10	<input type="text" value="11"/> 18
Monitoring & Performance Indicator Skills	<input type="text" value="9"/> 15	<input type="text" value="11"/> 18	<input type="text" value="9"/> 15	<input type="text" value="4"/> 7	<input type="text" value="28"/> 46
.....	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
.....	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
.....	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Roles of Governors	<input type="text" value="23"/> 38	<input type="text" value="16"/> 26	<input type="text" value="7"/> 11	<input type="text" value="3"/> 5	<input type="text" value="12"/> 20
Interaction with Other Governing Bodies	<input type="text" value="11"/> 18	<input type="text" value="6"/> 10	<input type="text" value="6"/> 10	<input type="text" value="1"/> 2	<input type="text" value="37"/> 61
Interaction with Commerce and Industry	<input type="text" value="9"/> 15	<input type="text" value="6"/> 10	<input type="text" value="6"/> 10	<input type="text" value="4"/> 7	<input type="text" value="36"/> 59
Governing Body/LEA/Central Government Relationships	<input type="text" value="14"/> 23	<input type="text" value="16"/> 26	<input type="text" value="5"/> 8	<input type="text" value="2"/> 3	<input type="text" value="24"/> 39
.....	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
.....	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
.....	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Others (please describe briefly) in the spaces provided (broadly divided into content, skills and procedures, roles within and beyond the school).					

To assess the METHOD OF TRAINING DELIVERY (PERSONNEL) in the columns marked 'Significance' please tick ONE box for each of the delivery personnel suggested, adding any other categories of personnel that may be of relevance to your Authority.

(If the training delivery has not yet been structured or is in its early stages it would be quite acceptable to record 'Not yet used' or 'Low' in all of the boxes).

METHOD OF TRAINING DELIVERY (PERSONNEL):	SIGNIFICANCE:			
	HIGH %	MEDIUM %	LOW %	NOT YET USED %
LEA officers responsible for training	<input type="checkbox"/> 41 67	<input type="checkbox"/> 12 20	<input type="checkbox"/> 3 5	<input type="checkbox"/> 5 8
Advisers	<input type="checkbox"/> 25 41	<input type="checkbox"/> 19 31	<input type="checkbox"/> 10 16	<input type="checkbox"/> 7 11
University/Polytechnic staff	<input type="checkbox"/> 1 2	<input type="checkbox"/> 5 8	<input type="checkbox"/> 14 23	<input type="checkbox"/> 41 67
Higher Education staff	<input type="checkbox"/> 2 3	<input type="checkbox"/> 3 5	<input type="checkbox"/> 12 20	<input type="checkbox"/> 44 72
Adult Education staff	<input type="checkbox"/> 8 13	<input type="checkbox"/> 9 15	<input type="checkbox"/> 11 18	<input type="checkbox"/> 33 54
Other Community tutors (part-time, occasional tutors)	<input type="checkbox"/> 7 11	<input type="checkbox"/> 8 13	<input type="checkbox"/> 7 11	<input type="checkbox"/> 39 64
Headteachers/School staff	<input type="checkbox"/> 16 26	<input type="checkbox"/> 21 34	<input type="checkbox"/> 9 15	<input type="checkbox"/> 15 25
Governors	<input type="checkbox"/> 12 20	<input type="checkbox"/> 18 30	<input type="checkbox"/> 13 21	<input type="checkbox"/> 18 30
Church Tutors	<input type="checkbox"/> 5 8	<input type="checkbox"/> 9 15	<input type="checkbox"/> 15 25	<input type="checkbox"/> 32 52
Commerce/Professions training staff	<input type="checkbox"/> 1 2	<input type="checkbox"/> 3 5	<input type="checkbox"/> 7 11	<input type="checkbox"/> 50 82
Education Consultants	<input type="checkbox"/> 3 5	<input type="checkbox"/> 3 5	<input type="checkbox"/> 10 16	<input type="checkbox"/> 45 74
Others (please describe briefly):				
.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

To assess the METHOD OF TRAINING DELIVERY (MATERIALS) in the columns marked 'Significance' please tick ONE box for each of the delivery materials suggested, adding any other categories of materials that may be of relevance to your Authority.

(If the training delivery has not yet been structured or is in its early stages it would be quite acceptable to record 'Not yet used' or 'Low' in all of the boxes).

METHOD OF TRAINING DELIVERY (MATERIALS):	SIGNIFICANCE:				NOT YET USED
	HIGH	MEDIUM	LOW		
Materials produced by:	%	%	%	%	
LEA staff	<input type="checkbox"/> 49 80	<input type="checkbox"/> 7 11	<input type="checkbox"/> 4 7	<input type="checkbox"/> 1 2	
University/Polytechnic staff	<input type="checkbox"/> 2 3	<input type="checkbox"/> 3 5	<input type="checkbox"/> 12 20	<input type="checkbox"/> 44 72	
Higher Education staff	<input type="checkbox"/> 1 2	<input type="checkbox"/> 2 3	<input type="checkbox"/> 9 15	<input type="checkbox"/> 49 80	
Adult Education staff	<input type="checkbox"/> 6 10	<input type="checkbox"/> 5 8	<input type="checkbox"/> 8 13	<input type="checkbox"/> 42 69	
Community Tutors	<input type="checkbox"/> 2 3	<input type="checkbox"/> 3 5	<input type="checkbox"/> 9 15	<input type="checkbox"/> 47 77	
Headteachers/School staff	<input type="checkbox"/> 12 20	<input type="checkbox"/> 16 26	<input type="checkbox"/> 14 23	<input type="checkbox"/> 19 31	
Governors	<input type="checkbox"/> 5 8	<input type="checkbox"/> 13 21	<input type="checkbox"/> 11 18	<input type="checkbox"/> 32 52	
Church Tutors	<input type="checkbox"/> 3 5	<input type="checkbox"/> 10 16	<input type="checkbox"/> 13 21	<input type="checkbox"/> 35 57	
Commerce/Professions training staff	<input type="checkbox"/> 0 0	<input type="checkbox"/> 2 3	<input type="checkbox"/> 10 16	<input type="checkbox"/> 49 80	
LMS Initiative Training Package	<input type="checkbox"/> 26 43	<input type="checkbox"/> 15 25	<input type="checkbox"/> 7 11	<input type="checkbox"/> 13 21	
Education Consultants	<input type="checkbox"/> 3 5	<input type="checkbox"/> 7 11	<input type="checkbox"/> 6 10	<input type="checkbox"/> 45 74	
Open University	<input type="checkbox"/> 15 25	<input type="checkbox"/> 19 31	<input type="checkbox"/> 15 25	<input type="checkbox"/> 12 20	
BBC/Local Radio/TV material	<input type="checkbox"/> 7 11	<input type="checkbox"/> 15 25	<input type="checkbox"/> 13 21	<input type="checkbox"/> 26 43	
Independent Radio/TV material	<input type="checkbox"/> 2 3	<input type="checkbox"/> 0 0	<input type="checkbox"/> 9 15	<input type="checkbox"/> 50 82	
National Associations (eg NAGM)	<input type="checkbox"/> 17 28	<input type="checkbox"/> 18 30	<input type="checkbox"/> 8 13	<input type="checkbox"/> 18 30	
Other (please describe briefly):					
.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

To assess the METHOD OF TRAINING DELIVERY (GEOGRAPHICAL) please tick the box in column marked 'Main Strategy' the ONE description which best describes the Authority approach, adding your own strategy description if those offered are inadequate.

METHOD OF TRAINING DELIVERY (GEOGRAPHICAL):	(Tick): MAIN STRATEGY:	%
Single Governing Bodies/School Staff	<input checked="" type="checkbox"/> 4	7
Clustered Governing Bodies/School Staff (feeder primary with secondary	<input checked="" type="checkbox"/> 7	11
Clustered Governing Bodies/School Staff (urban/rural areas)	<input checked="" type="checkbox"/> 4	7
Clustered Governing Bodies/School Staff (Education Area Offices)	<input checked="" type="checkbox"/> 7	11
Open to all Governing Bodies/School Staff based on urban/rural centres	<input checked="" type="checkbox"/> 11	18
Open to all Governing Bodies/School Staff based on Education Area Offices	<input checked="" type="checkbox"/> 6	10
Open to all Governing Bodies/School Staff based on institution locations (eg university, college)	<input checked="" type="checkbox"/> 6	10
Other (please describe ONE briefly):		
.....	<input checked="" type="checkbox"/> 5	8
No Geographical Strategy has been developed yet	<input checked="" type="checkbox"/> 5	8
No Geographical Strategy is necessary in this Authority	<input checked="" type="checkbox"/> 6	10

To assess how much time has been given to IDENTIFICATION OF NEEDS, the METHOD OF TRAINING DELIVERY (PERSONNEL), (MATERIALS), (GEOGRAPHICAL) please tick in the column marked 'Years' the ONE box which represents the amount of time which has been spent in preparing to train for the new responsibilities under the 1986 and 1988 Acts.

Time given to training (Tick) YEARS

Less than ¼ year	<input checked="" type="checkbox"/> 18	% 30
¼ to 1 year	<input checked="" type="checkbox"/> 19	31
1 to 1½ years	<input checked="" type="checkbox"/> 10	16
1½ to 2 years	<input checked="" type="checkbox"/> 6	10
2 to 2½ years	<input checked="" type="checkbox"/> 3	5
2½ to 3 years	<input checked="" type="checkbox"/> 2	3
More than 3 years	<input checked="" type="checkbox"/> 3	5

To assess how you perceive the current phase in preparing and delivering training for Governors (and Headteachers/Senior Staff) how would you describe your Authority:

TICK ONE BOX:

Identification of needs and general planning phase	<input checked="" type="checkbox"/> 5	% 8
Planning details of the introductory training phase	<input checked="" type="checkbox"/> 11	18
Delivering the introductory training phase	<input checked="" type="checkbox"/> 13	21
Assessment of introductory training phase	<input checked="" type="checkbox"/> 4	7
Planning details of the secondary phase	<input checked="" type="checkbox"/> 23	38
Other (please describe briefly):	<input checked="" type="checkbox"/> 5	8

APPENDIX 15

To assess whether the Governors, Headteachers and Senior Staff from the same schools are going to be trained together or whether other strategies are being developed, in the columns marked 'Preferred Method' please tick ONE box for each identified training need to indicate the preference expressed within your Authority.

PREFERRED METHOD:

COLUMN A: GOVERNORS BY THEMSELVES; HEADTEACHERS BY THEMSELVES
 COLUMN B: GOVERNORS AND HEADTEACHERS TOGETHER
 COLUMN C: GOVERNORS BY THEMSELVES; HEADTEACHER AND SENIOR STAFF TOGETHER
 COLUMN D: GOVERNORS AND HEADTEACHERS AND SENIOR STAFF TOGETHER
 COLUMN E: NO PREFERRED METHOD EXPRESSED

Note: If you have added other IDENTIFIED TRAINING NEEDS categories, please indicate the PREFERRED METHOD for these as well.

Note: If there has emerged a marked difference in the PREFERRED METHOD for training Governors and Headteachers and Senior Staff of primary and secondary schools, you can indicate this by adding a letter to the boxes which you have ticked.

PRIMARY/MIDDLE SCHOOLS (P)
 SECONDARY SCHOOLS (S)
 SIXTH FORM COLLEGES (C)

PREFERRED METHOD:

IDENTIFIED TRAINING NEEDS	Separate		Joint	
	A&C	%	B&D	%
1986,1988 Act Details	30	49	20	33
National Curriculum	34	56	16	26
Finance and Budgeting	22	36	28	46
Building & Fabric Maintenance	15	25	17	28
Grounds Maintenance	13	21	12	20
Health/Sex Education	17	28	26	43
Governors & Staff Legal Responsibilities	25	41	24	39
Multi-Ethnic Education	22	36	13	21

	<u>Separate</u>		<u>Joint</u>			
	A&C	%	B&D	%	E	%
Gifted & Special Needs Provision	27	44	10	16	24	39
Equal Opportunities	23	38	18	30	20	33
.....						
.....						
.....						
General Management Skills	28	46	16	26	17	28
Communication Skills	26	43	13	21	22	36
Governing Body Procedures	30	49	21	34	10	16
Interviewing & Staff Selection Skills	28	46	22	36	11	18
Monitoring & Performance Indicator Skills	18	30	15	25	28	46
.....						
.....						
.....						
Roles of Governors	30	49	19	31	12	20
Interaction with Other Governing Bodies	17	28	7	11	37	61
Interaction with Commerce and Industry	15	25	10	16	36	59
Governing Body/LEA/Central Government Relationships	19	31	18	30	24	39
.....						
.....						
.....						

Others (please describe briefly) in the spaces provided (broadly divided into content, skills and procedures, roles within and beyond the school).

APPENDIX 16.

A COMPARISON OF THE PERCEPTION OF OFFICERS AND ADVISERS IDENTIFYING MANAGEMENT TRAINING IN TERMS OF SEPARATE OR JOINT DELIVERY STRATEGY.

APPENDIX 16A: THE NATIONAL CURRICULUM.

PERSONNEL IDENTIFYING TRAINING NEEDS: 'Medium' 'Low' and 'Nil'	Total	TRAINING DELIVERY for GOVERNORS and SCHOOL STAFF		
		Separately	Joint	No Preferred Method
LEA Officer Responsible for Training	24	11 (46%)	7 (29%)	6 (25%)
Advisers	49	25 (51%)	14 (29%)	10 (20%)

APPENDIX 16B: FINANCE AND BUDGETING

PERSONNEL IDENTIFYING TRAINING NEEDS: 'Medium' 'Low' and 'Nil'	Total	TRAINING DELIVERY for GOVERNORS and SCHOOL STAFF		
		Separately	Joint	No Preferred Method
LEA Officer Responsible for Training	24	8 (33%)	10 (42%)	6 (25%)
Advisers	49	19 (39%)	20 (41%)	10 (20%)

APPENDIX 17.

A COMPARISON OF THE PERCEPTION OF OFFICERS AND ADVISERS DELIVERING MANAGEMENT TRAINING IN TERMS OF SEPARATE OR JOINT DELIVERY STRATEGY.

APPENDIX 17A: THE NATIONAL CURRICULUM.

PERSONNEL DELIVERING TRAINING NEEDS 'High'	Total	TRAINING DELIVERY for GOVERNORS and SCHOOL STAFF		
		Separately	Joint	No Preferred Method
LEA Officer Responsible for Training	41	27 (66%)	10 (24%)	4 (10%)
Advisers Delivering Training	25	17 (68%)	6 (24%)	2 (8%)

APPENDIX 17B: FINANCE AND BUDGETING

PERSONNEL DELIVERING TRAINING NEEDS 'High'	Total	TRAINING DELIVERY for GOVERNORS and SCHOOL STAFF		
		Separately	Joint	No Preferred Method
LEA Officer Responsible for Training	41	14 (34%)	22 (54%)	5 (12%)
Advisers Delivering Training	25	10 (40%)	12 (48%)	3 (12%)

APPENDIX 18.

A COMPARISON OF THE PERCEPTION OF OFFICERS AND ADVISERS DELIVERING MANAGEMENT TRAINING IN TERMS OF SEPARATE OR JOINT DELIVERY STRATEGY.

APPENDIX 18A: THE NATIONAL CURRICULUM.

PERSONNEL DELIVERING TRAINING NEEDS: 'Medium' 'Low' and 'Nil'	Total	TRAINING DELIVERY for GOVERNORS and SCHOOL STAFF		
		Separately	Joint	No Preferred Method
LEA Officer Responsible for Training	20	7 (35%)	6 (30%)	7 (35%)
Advisers Delivering Training	36	17 (47%)	10 (28%)	9 (25%)

APPENDIX 18B: FINANCE AND BUDGETING

PERSONNEL DELIVERING TRAINING NEEDS: 'Medium' 'Low' and 'Nil'	Total	TRAINING DELIVERY for GOVERNORS and SCHOOL STAFF		
		Separately	Joint	No Preferred Method
LEA Officer Responsible for Training	20	8 (40%)	6 (30%)	6 (30%)
Advisers Delivering Training	36	12 (33%)	16 (45%)	8 (22%)

APPENDIX 19.

A COMPARISON OF AUTHORITIES' PERCEPTIONS OF THE SIGNIFICANCE OF TRAINING MATERIALS AND THE PHASE OF TRAINING DELIVERY.

APPENDIX 19A: LEA MATERIALS

Phase of Training: Authorities perception of significance:

	HIGH	MEDIUM	LOW	NIL	Total
Identify Needs and General Planning	4 (80%)	0 (0%)	1 (20%)	0 (0%)	5
Plan Details of Introductory Phase	6 (55%)	3 (27%)	1 (9%)	1 (9%)	11
Deliver Introductory Phase	11 (85%)	0 (0%)	2 (15%)	0 (0%)	13
Assessment of Introductory Phase	3 (75%)	1 (25%)	0 (0%)	0 (0%)	4
Planning Details of Secondary Phase	21 (91%)	3 (9%)	0 (0%)	0 (0%)	23
Other:	4 (80%)	1 (20%)	0 (0%)	0 (0%)	5

APPENDIX 19B: LMS MATERIALS

Phase of Training: Authorities perception of significance:

	HIGH	MEDIUM	LOW	NIL	Total
Identify Needs and General Planning	2 (40%)	0 (0%)	3 (60%)	0 (0%)	5
Plan Details of Introductory Phase	3 (27%)	2 (18%)	1 (10%)	5 (45%)	11
Deliver Introductory Phase	5 (38%)	4 (30%)	3 (23%)	1 (9%)	13
Assessment of Introductory Phase	2 (50%)	2 (50%)	0 (0%)	0 (0%)	4
Planning Details of Secondary Phase	12 (52%)	5 (22%)	0 (0%)	6 (26%)	23
Other:	2 (40%)	2 (40%)	0 (0%)	1 (20%)	5

APPENDIX 20.

A COMPARISON OF THE AUTHORITY PERCEPTION OF LEA OFFICERS' SIGNIFICANCE AND THE LENGTH OF TRAINING DELIVERY.

Number of Authorities perceiving LEA Officers to be of significance:							
Weighted Value:	High (3)	Medium (2)	Low (1)	Nil (0)	n =	Total Value	Average Value:
Months of Training:							
Less than 6 Months	7	6	1	4	n = 18	34	1.89
6 to 12 Months	15	2	1	1	n = 19	50	2.63
12 to 18 Months	9	1	0	0	n = 10	29	2.90
18 to 24 Months	4	2	0	0	n = 6	16	2.66
24 to 30 Months	3	0	0	0	n = 3	9	3.00
30 to 36 Months	1	1	0	0	n = 2	5	2.50
More than 36 Months	2	0	1	0	n = 3	7	2.33

Months of Training:

Number of Authorities perceiving Advisers to be of significance:							
Weighted Value:	High (3)	Medium (2)	Low (1)	Nil (0)	n =	Total Value	Average Value:
Less than 6 Months	7	5	2	4	n = 18	33	1.83
6 to 12 Months	11	1	5	2	n = 19	40	2.11
12 to 18 Months	3	5	2	0	n = 10	21	2.10
18 to 24 Months	1	4	1	0	n = 6	12	2.00
24 to 30 Months	1	2	0	0	n = 3	7	2.33
30 to 36 Months	1	1	0	0	n = 2	5	2.50
More than 36 Months	1	1	0	0	n = 3	5	1.67

APPENDIX 21.

A COMPARISON OF THE AUTHORITY PERCEPTION OF LEA OFFICERS' AND ADVISERS' SIGNIFICANCE AND THE PHASE OF TRAINING DELIVERY.

Authorities perceiving LEA Officers to be of significance:

	High (3)	Medium (2)	Low (1)	Nil (0)	n =	Total Value	Average Value:
--	-------------	---------------	------------	------------	-----	----------------	-------------------

Phase of Training:

Identification of needs and general planning:	3	0	0	2	n = 5	9	1.80
--	---	---	---	---	-------	---	------

Planning details of introductory phase:	5	3	1	1	n = 11	22	2.00
--	---	---	---	---	--------	----	------

Delivering introductory phase:	8	3	1	1	n = 13	31	2.38
-----------------------------------	---	---	---	---	--------	----	------

Assessment of introductory phase:	3	1	0	0	n = 4	11	2.75
--------------------------------------	---	---	---	---	-------	----	------

Planning details of secondary phase:	20	3	0	0	n = 23	66	2.87
---	----	---	---	---	--------	----	------

(Other:	2	2	1	0	n = 5	11	2.20)
---------	---	---	---	---	-------	----	-------

Authorities perceiving Adviser to be of significance:

	High (3)	Medium (2)	Low (1)	Nil (0)	n =	Total Value	Average Value:
--	-------------	---------------	------------	------------	-----	----------------	-------------------

Phase of Training:

Identification of needs and general planning:	2	1	0	2	n = 5	8	1.60
--	---	---	---	---	-------	---	------

Planning details of introductory phase:	3	5	1	2	n = 11	20	1.82
--	---	---	---	---	--------	----	------

Delivering introductory phase:	5	4	2	2	n = 13	25	1.92
-----------------------------------	---	---	---	---	--------	----	------

Assessment of introductory phase:	2	1	1	0	n = 4	9	2.25
--------------------------------------	---	---	---	---	-------	---	------

Planning details of secondary phase:	11	7	5	0	n = 23	52	2.26
---	----	---	---	---	--------	----	------

(Other:	2	1	1	1	n = 5	9	1.80)
---------	---	---	---	---	-------	---	-------

APPENDIX D**FOR THE ATTENTION OF MR N C H VARNON****AUTHORITY RESPONSE: SOUTH GLAMORGAN**

To assess how the IDENTIFICATION OF TRAINING NEEDS for governors and school staff has been carried out, in the columns marked 'Significance' please tick one box for each input which indicates how you perceive the input from the source categories suggested, adding any others in the spaces provided which are of relevance to your Authority.

(If the governor training needs have not yet been identified, or if the identification process is still progressing, it would be quite acceptable to record either 'Nil' or 'Low' in all of the boxes.)

SIGNIFICANCE:

IDENTIFICATION OF TRAINING NEEDS; SOURCE:	HIGH	MEDIUM	LOW	NIL
Questionnaire to Governors	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Written requests from Governors	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Verbal requests from Governors	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Questionnaire to Headteachers	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Written requests from Headteachers	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Verbal requests from Headteachers	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Written or verbal input from:				
LEA Officers responsible for training	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other LEA Officers	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Advisers	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Elected Members of the Council	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Other LEAs	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Universities/Polytechnics	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Higher Education Colleges	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Adult Education Institutions	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

	HIGH	MEDIUM	LOW	NIL
Church Authorities	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
PTA	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Trade Unions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Commerce/Industry	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
National Association (e.g. of Governors and Managers)	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
DES Circulars/Welsh Office Circulars	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Research Publications (e.g. NFER)	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Regular Publications (e.g. TES, Education)	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Others (please describe briefly):				
.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

To assess the priority placed on the IDENTIFIED TRAINING NEEDS, in the columns marked 'Priority' please tick one box for each training need to indicate how the categories suggested are being considered in terms of priority in the preparation and delivery of training, adding any other categories in the spaces provided which are of relevance to your Authority.

(If the governor training needs have not yet been identified, or if the identification process is still progressing, it would be quite acceptable to record either 'Nil' or 'Low' in all of the boxes.)

PRIORITY:

IDENTIFIED TRAINING NEEDS:	HIGH	MEDIUM	LOW	NIL
1986, 1988 Act Details	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
National Curriculum	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Finance and Budgeting	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Building and Fabric Maintenance	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Grounds Maintenance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Health/Sex Education	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Governors and Staff Legal Responsibilities	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Multi-Ethnic Education	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Gifted and Special Needs Provision	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Equal Opportunities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	HIGH	MEDIUM	LOW	NIL
General Management Skills	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Communication Skills	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Governing Body Procedures	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Interviewing & Staff Selection Skills	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Monitoring & Performance Indicator Skills	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Roles of Governors	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Interaction with Other Governing Bodies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Interaction with Commerce & Industry	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Governing Body/LEA/Central Government Relationships	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Others (please describe briefly) in the spaces provided (broadly divided into content, skills and procedures, roles within and beyond the school).

To assess whether the Governors, Headteachers and Senior Staff from the same schools are going to be trained together or whether other strategies are being developed, in the columns marked 'Preferred Method' please tick ONE box for each identified training need to indicate the preference expressed within your Authority.

PREFERRED METHOD:

COLUMN A: GOVERNORS BY THEMSELVES; HEADTEACHERS BY THEMSELVES

COLUMN B: GOVERNORS AND HEADTEACHERS TOGETHER

COLUMN C: GOVERNORS BY THEMSELVES; HEADTEACHER AND SENIOR STAFF TOGETHER

COLUMN D: GOVERNORS AND HEADTEACHERS AND SENIOR STAFF TOGETHER

COLUMN E: NO PREFERRED METHOD EXPRESSED

Note: If you have added other IDENTIFIED TRAINING NEEDS categories, please indicate the PREFERRED METHOD for these as well.

Note: If there has emerged a marked difference in the PREFERRED METHOD for training Governors and Headteachers and Senior Staff of primary and secondary schools, you can indicate this by adding a letter to the boxes which you have ticked.

PRIMARY/MIDDLE SCHOOLS (P)
SECONDARY SCHOOLS (S)
SIXTH FORM COLLEGES (C)

Example Response:

	A	B	C	D	E
Finance and Budgeting	<input checked="" type="checkbox"/> s	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> p	<input type="checkbox"/>

PREFERRED METHOD:

IDENTIFIED TRAINING NEEDS

	A	B	C	D	E
1986,1988 Act Details	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
National Curriculum	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Finance and Budgeting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Building & Fabric Maintenance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Grounds Maintenance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Health/Sex Education	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Governors & Staff Legal Responsibilities	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Multi-Ethnic Education	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

	A	B	C	D	E
Gifted & Special Needs Provision	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Equal Opportunities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
General Management Skills	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communication Skills	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Governing Body Procedures	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Interviewing & Staff Selection Skills	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Monitoring & Performance Indicator Skills	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Roles of Governors	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Interaction with Other Governing Bodies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Interaction with Commerce and Industry	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Governing Body/LEA/Central Government Relationships	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Others (please describe briefly) in the spaces provided (broadly divided into content, skills and procedures, roles within and beyond the school).

To assess the METHOD OF TRAINING DELIVERY (PERSONNEL) in the columns marked 'Significance' please tick ONE box for each of the delivery personnel suggested, adding any other categories of personnel that may be of relevance to your Authority.

(If the training delivery has not yet been structured or is in its early stages it would be quite acceptable to record 'Not yet used' or 'Low' in all of the boxes).

METHOD OF TRAINING DELIVERY (PERSONNEL):	SIGNIFICANCE:			
	HIGH	MEDIUM	LOW	NOT YET USED
LEA Officers responsible for training	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Advisers	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
University/Polytechnic staff	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Higher Education staff	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Adult Education staff	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Other Community tutors (part-time, occasional tutors)	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Headteachers/School staff	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Governors	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Church Tutors	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Commerce/Professions training staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Education Consultants	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Others (please describe briefly):				
.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

To assess the METHOD OF TRAINING DELIVERY (MATERIALS) in the columns marked 'Significance' please tick ONE box for each of the delivery materials suggested, adding any other categories of materials that may be of relevance to your Authority.

(If the training delivery has not yet been structured or is in its early stages it would be quite acceptable to record 'Not yet used' or 'Low' in all of the boxes).

METHOD OF TRAINING DELIVERY (MATERIALS):	SIGNIFICANCE:			NOT YET USED
	HIGH	MEDIUM	LOW	
Materials produced by:				
LEA staff	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
University/Polytechnic staff	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Higher Education staff	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Adult Education staff	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Community Tutors	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Headteachers/School staff	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Governors	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Church Tutors	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Commerce/Professions training staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
LMS Initiative Training Package	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Education Consultants	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Open University	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
BBC/Local Radio/TV material	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Independent Radio/TV material	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
National Associations (eg NAGM)	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Other (please describe briefly):				
.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

To assess the METHOD OF TRAINING DELIVERY (GEOGRAPHICAL) please tick the box in column marked 'Main Strategy' the ONE description which best describes the Authority approach, adding your own strategy description if those offered are inadequate.

METHOD OF TRAINING DELIVERY (GEOGRAPHICAL):

(Tick): MAIN STRATEGY:

Single Governing Bodies/School Staff	<input type="checkbox"/>
clustered Governing Bodies/School Staff (feeder primary with secondary	<input type="checkbox"/>
clustered Governing Bodies/School Staff (urban/rural areas)	<input type="checkbox"/>
clustered Governing Bodies/School Staff (Education Area Offices)	<input type="checkbox"/>
Open to all Governing Bodies/School Staff based on urban/rural centres	<input type="checkbox"/>
Open to all Governing Bodies/School Staff based on Education Area Offices	<input type="checkbox"/>
Open to all Governing Bodies/School Staff based on institution locations (eg university, college)	<input checked="" type="checkbox"/>
Other (please describe ONE briefly):	
.....	<input type="checkbox"/>
No Geographical Strategy has been developed yet	<input type="checkbox"/>
No Geographical Strategy is necessary in this Authority	<input type="checkbox"/>

To assess how much time has been given to IDENTIFICATION OF NEEDS, the METHOD OF TRAINING DELIVERY (PERSONNEL), (MATERIALS), (GEOGRAPHICAL) please tick in the column marked 'Years' the ONE box which represents the amount of time which has been spent in preparing to train for the new responsibilities under the 1986 and 1988 Acts.

Time given to training (Tick) YEARS

Less than ½ year	<input checked="" type="checkbox"/>
½ to 1 year	<input type="checkbox"/>
1 to 1½ years	<input type="checkbox"/>
1½ to 2 years	<input type="checkbox"/>
2 to 2½ years	<input type="checkbox"/>
2½ to 3 years	<input type="checkbox"/>
More than 3 years	<input type="checkbox"/>

To assess how you perceive the current phase in preparing and delivering training for Governors (and Headteachers/Senior Staff) how would you describe your Authority:

TICK ONE BOX:

Identification of needs and general planning phase	<input type="checkbox"/>
Planning details of the introductory training phase	<input type="checkbox"/>
Delivering the introductory training phase	<input checked="" type="checkbox"/>
Assessment of introductory training phase	<input type="checkbox"/>
Planning details of the secondary phase	<input type="checkbox"/>
Other (please describe briefly):	
.....	<input type="checkbox"/>

APPENDIX 23.

SCHEDULE OF GOVERNOR INTERVIEWS.

	Pre-training interview	Post-training interview
Mrs F.	May 12	Nov 20
Mrs L.	May 12	Dec 15
Mrs B.	May 25	Nov 20
Mrs H.	May 25	Dec 15
Mrs S.	May 25	Dec 16
Mr F.	May 25	Nov 20
Mrs H.P.	June 6	Dec 13
Father L.	June 6	Dec 7
Mr T.	June 6	Nov 22
Mr P.	June 6	Nov 29
Mr J.	June 8	Dec 7
Mr K.	Sep 12	Dec 12
Mr L.	Sep 12	Dec 16

APPENDIX 24.

TRANSCRIPT OF VOLUNTEER GOVERNOR INTERVIEW.

TRANSCRIPTS

POST TRAINING INTERVIEW: MR. P.

Author: Well, now that you've attended an introductory governor training course, I'm interested in what did you think of the training venue that was used. (The school of which he is a governor.)

Mr.P.: Given the choice I would have preferred a greater comfort, which is not available in schools.

Author: What did you think of the tutors; were they as you had hoped?

Mr.P.: The tutors were enthusiastic and quite knowledgeable; although they knew their ABC pretty well, they lacked the white heat of committee experience. They were far from it - immature in that respect.

Author: So you have some reservations about the tutors, but what about the materials that they used: was it satisfactory?

Mr.P.: I got all that I needed. I don't require any more because in many ways during the course of his career a governor will be constipated with material!

Author: Before we look at any detailed comments you would like to make about individual training modules, what's your impression of the introductory training 'as a whole'?

Mr.P.: I feel that I got what I wanted. The (other) people - I think that they might have been over-whelmed. Then one other point, it occurred to me, as one who is so far advanced in blood that the going back would be just as tedious as going forward - I think that so many of the new committee people feel that it's a debating assembly and not a decision-making assembly. Their work is to reach a decision, not to reach conclusions.

I think they (tutors) failed to use the varied experience of the people there. This is something which you should exploit. There are very few careers without committees these days.

Author: Was the failure to use people's varied experience because of lack of adequate time, or was there another reason, do you think?

Mr.P.: We weren't given the time to socialise adequately, though one appreciates the time factor. But in my experience, all the courses I've attended I've learnt more from my fellow students than I have from the tutors. They (other governors at the training) were pleased to meet other

governors, and they said so.

Author: Right, so let's look at some of the training modules in more detail. Roles and responsibilities: what did you make of that?

Mr.P.: I think tutors should make every meeting a governors' meeting. I think the role-playing efforts were a little naive; they were a bit too boy-scoutish. Games - you have to be so careful.....some people feel embarrassed.

Author: Yes, I've heard varying reactions to the role-play. Perhaps it depends rather on the sort of training that you were expecting: role-play can be a bit of a 'culture shock'!

Mr.P.: Exactly!

Author: The staff selection and appointment module: an important issue, perhaps; certainly an area which will be important to consider in terms of a school budget. What did you think of the training?

Mr.P.: Knowing it from the disasters and the wrong decisions that I have made....I trembled at the thought that selection should be in the hands of the amateurs - putting it that way....kindly! It was always a case of: "There was never enough choice.....! You never get the ideal.....let's advertise again."

Author: The National Curriculum - a significant change, perhaps, since you were headteacher. Any reactions to the training that you would like to make?

Mr.P.: The National Curriculum, yes. This was rather overwhelming... putting a quart into a pint pot. So much to cover; difficult to know where to start. I think a glimpse at the enormity of the enterprise was sufficient.

Author: What about the module on the legal aspects of a governor's responsibility?

Mr.P.: I've been a magistrate. I know that the law can be an ass! The governors, well they were made conscious of the problem. The course succeeded as a wakening but, like a university degree, it's afterwards that you really begin to learn.

Author: And what of the module on finance? I gather you missed this: do you know what other governors thought of it? Have you talked to them?

Mr.P.: Yes, I've talked to some of them and they seemed to indicate it was complex. They were awe-stricken of it. The scale of it was another revelation.

Author: We have to begin to think about future 'in-depth' training modules, but the Authority would like to be guided, by the governors themselves, as to what the content should be. What advice could you give us?

Mr.P.: Well, more training will be necessary for many. I think that governors need to understand the sub-committees 'factor'. You want a course which is, as it were, a close up. Take the National Curriculum for example. Use Dyffryn (the South Glamorgan's training centre). A day's course would be just as effective. Every Tuesday (the evening for Mr.P.'s introductory training modules) I begin to resent, myself. I appreciate it's not possible for a great many people. The parking problem was my exasperation. My dream is an adult education centre in every town where you sit in arm chairs, and so on. When you're reduced to classroom accommodation.....!

Now staff selection....I would leave it to the head. Other areas of training? Well, the governors....they were very conscious of the fact that they hadn't had time to assimilate it. We do need much more time. Some are concerned with LMS, obviously, and the relationship with the community. And discipline is another important point worth looking at.

Author: So how do you see the future for training?

Mr.P.: Give it to them as a book. Tutors should be aware of the fact that we can all read, and that saves time. A home study kit would be useful. Games? Well, you have to be so careful....some people feel embarrassed. Speaking about the training as a whole, I got what I wanted. Collingwood, I think it was, who said that education consists of asking the right questions in the right order. Well I know all the questions to ask now....I'm not certain of the order yet, and I shall probably never know the answers!

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